Complete User Manual

e-Payments solutions for education

www.parentpay.com

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About this manual

This manual provides guidance on the day to day use of the **ParentPay** system. However in many cases the solution may be used differently by schools to meet their needs and situation therefore certain sections may not apply to all users.

Example screens

Where example screens are displayed, only fictitious payment and user data is used.

The ParentPay web platform

A small amount of data input is expected to be done by a school to enable them to offer the solution to their parents and pupil guardians. The expectation is that parents will have the option to choose to pay via ParentPay, alongside other options currently offered, although many schools are planning a wholly 'cashless' environment in the future.

Pre-conditions before setup

- the School is a customer of ParentPay and is setup on the ParentPay payment platform
- parents using the solution have children 'on role' at the school
- account payable data is updated on the school system and is available for the parent to view
- all parents have a valid user account on the ParentPay platform (this is a desirable but not essential pre-condition)

Software installation

The **ParentPay** solution is wholly web-based and there is no software to install. An application called the '**ParentPay MIS:Sync'** enables data to be converted into a format that the web platform can accept. This can be downloaded from your **ParentPay** account and installed on a local PC.

Data Protection

ParentPay is registered as a data processor under the Data Protection Act (DPA) and operates at all times within DPA guidelines. ParentPay takes data protection very seriously, and our intention is always to provide a safe, secure service to all users and we invest significantly in technology, infrastructure and process to ensure this is the case. ParentPay provides the infrastructure and the applications for the school but does not use or own the data – hence the DPA registration as a data processor.

The school and local authority will already be registered as a Data Controller. Schools' data remains their responsibility and they remain fully in control of accessing, managing and updating all their data in the system. ParentPay's commitment to the school to act responsibly as a data processor is covered in our terms and conditions and is covered in our data protection and privacy policy.

Security

The web-based application is hosted, managed and maintained in a secure and reliable data centre environment. The data centre is provided by NTT Europe Online – part of the largest telecommunications company in the world and one of the largest hosting companies in the world.

The NTT service includes a comprehensive range of security management solutions including firewall, anti-virus and intrusion prevention and detection services to protect against external security threats.

Administrative access to the application environment is only possible with two factor authentication (password and certificate) and through encrypted data traffic (VPN).

All user access (parents, schools, and the local authority) is through a standard internet connection and browser and is only allowed through 128-bit encrypted HTTPS; the SSL certificate is issued and signed by Verisign.

Support

ParentPay online support

ParentPay's support site is specifically designed to give you all the support and information you need to get the most out of your ParentPay service, including bite size flash movie tutorials and printable pdf quick guides.

Telephone support
The ParentPay Support Team is always here to help – our phone lines are open Monday to Friday 08:30 – 16:30.
Dedicated school support line telephone: 02476 994 820

Email support

ParentPay's Support mailbox is monitored constantly during normal business hours 08:30-17:00 and continues to be monitored outside of business hours and during school holidays.

Issues reported via email are directed to the most appropriate member of our team and answered as soon as we can.

Please click on the following link to access the School Support Form or alternatively email support@parentpay.com

Getting Started

Login

Go to www.parentpay.com

- Click on the Login tab
- Type in your Username and Password as supplied by ParentPay
- Click Login (usernames and passwords are case sensitive)
- Activate your user account following the on screen instructions

During account activation you will change the username and password supplied by ParentPay and these should be used for all future access to your site.

Importing and managing data

Pupil data from your school's MIS (SIMS or other database) is managed and uploaded to ParentPay using our desk top tool, ParentPay MIS:Sync.

It is extremely important that your MIS is kept up to date with new starters, leavers, changes to FSM entitlement, special dietary requirements etc. All of this information impacts on both ParentPay accounts and the information accessible at till level on your cashless catering system if you have one.

ParentPay (online) and ParentPay MIS:Sync (the software tool installed locally on your PC) are completely separate applications.

MIS:Sync is used to manage:

- Pupils
- Staff
- Visitors and others
- Pre-admissions

Download MIS:Sync desktop software

- Login to ParentPay
- Click on the **Help tab**
- Go to the **ParentPay MIS:Sync software** section
- Click **Download MIS:Sync software**
- Click **Run** NB: if you are not given the option to run the installer click Save and save it to your computer for access locally
- Click **Run** - if requested click to Allow MIS:Sync to access your PC

The MIS:Sync setup wizard will now launch, follow the process and click Finish.

Setup MIS:Sync

PLEASE FOLLOW THESE INSTRUCTIONS CAREFULLY

Click on the **MIS:Sync icon** on your desktop:

- Enter your **ParentPay username and password**
- Enter your **Organisation ID** as follows depending on where your school is located:
  - **England**: school-1-(your 7 digit DFE(DCSF) number)
  - **Scotland**: school-3-(your 7 digit DFE(DCSF) number)
  - **Wales**: school-4-(your 7 digit DFE(DCSF) number)
  - **Northern Ireland**: school-2-(your 7 digit DFE(DCSF) number)
- Select **MIS** - SIMS or Other
- If you have proxy settings in school click on the **Proxy tab** at the top and enter them here then click **Test connection**
- Return to the **Login** tab
- Click **Continue**

Once logged into MIS:Sync go to **Tools>Check for updates** – follow the link through as necessary.

Go to **Tools>Options**

- Click on the **Connections** tab
- Enter your e-mail address in the **Notification email** field
- Tick **Receive email on automatic uploads**
- Tick **Receive email on manual uploads**
- Click **Save**

Go to **Tools>Settings**

- Click on **Auto update** tab
- Tick **Check for updates at start up**

Configuring MIS:Sync to link with your MIS

Pupil uploads - SIMS users

Go to **Tools>Options**

- Click on the **MIS** tab
- Enter your **SIMS.net username** and **password** NB: you must have sufficient SIMS access rights to enable MIS:Sync to install a report in SIMS
- Click on the **yellow** folder (MIS:Sync will locate your SIMS)
- Click **Save** – it will look as though it has not done anything but it has!

Go to **File>Exit** and then re-start MIS:Sync. MIS:Sync is now setup and you will not need to go to Tools again unless something changes.

Uploading pupil data

Following the initial set up, to refresh the information in MIS:Sync from SIMS in future to add any new pupils etc, you just need to login to MIS:Sync:

- Click on **Pupils>Auto update**

Pupil uploads – non SIMS users

In order to upload data using MIS:Sync you will need to create a report from your MIS system and then map the report to MIS:Sync.

The compulsory fields are as follows:

- PUPIL SURNAME
- PUPIL FORENAME
- ADMISSION/PUPIL ID NUMBER

  WARNING - watch the pupil id's remember to pad to leading zeros if necessary, check on ParentPay to make sure you are using the correct/same id numbers, remember that you need to upload the whole school and not duplicate id's

- UPN
- DATE OF BIRTH
- GENDER (MUST BE M FOR MALE AND F FOR FEMALE)
- YEAR GROUP
- REG GROUP

It is also recommended that you include the following:

- PARENT SALUTATION
- ADDRESS LINE 1 (HOUSE NAME)
- ADDRESS LINE 2 (HOUSE NUMBER)
- ADDRESS LINE 3 (STREET)
- ADDRESS LINE 4 (DISTRICT)
- ADDRESS LINE 5 (TOWN)
- ADDRESS LINE 6 (COUNTY)
- ADDRESS LINE 7 (POST CODE)
- ENTITLED TO FREE SCHOOL MEALS (MUST BE T FOR TRUE OR F FOR FALSE)
- FREE SCHOOL MEAL START DATE (required for FSM pupils)
- FREE SCHOOL MEAL END DATE
- ETHNICITY
- RELIGION
- DIETRY REQUIREMENTS
- EMAIL ADDRESSES

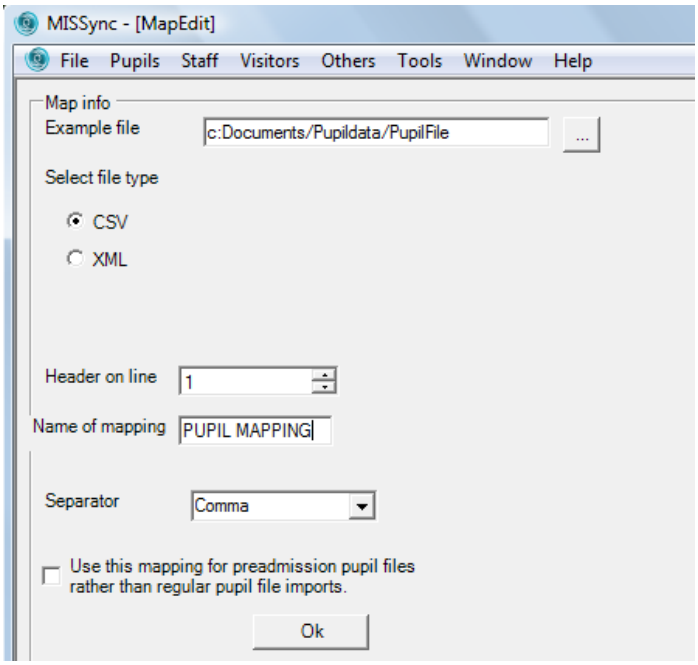
There must be no commas in any field, the upload must be of the whole school and all have original id's.

As soon as you have created your Pupil data file you need to save it as a CSV file. You then need to map your template via MIS:Sync – if you always create the same column headings in the same order you will only need to create your Mapping once. We suggest that you save the column headings as your Pupil Master Template to refer back to and use this as a guide every time you produce a new pupil csv file. You can always ensure these headings remain in any future uploads by copying and pasting the data from your created report into your saved Pupil Master Template.

Creating your Mapping Template

In MIS:Sync go to Tools>Create mapping

- Search for your saved Pupil data file
- File Type = CSV
- Header on Line = 1
- Give your Mapping a Name
- Separator = comma

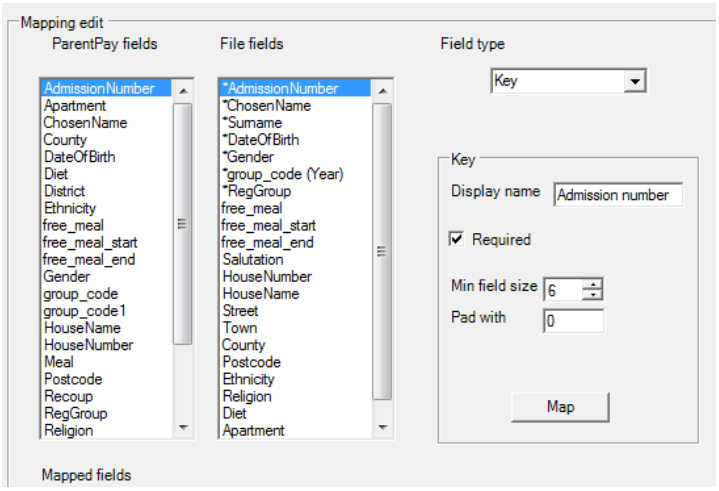


Click **OK**

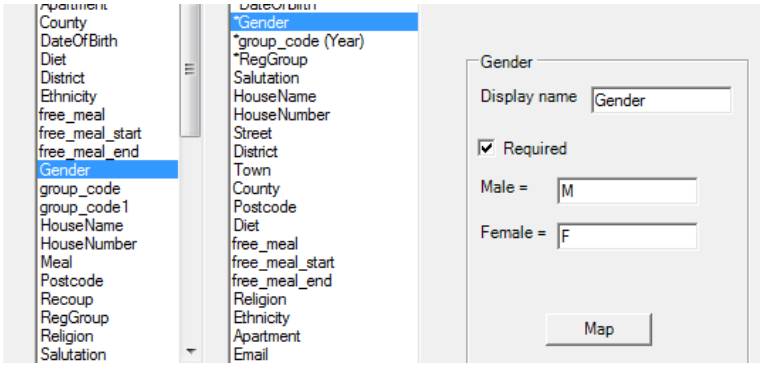
You will see a list of ParentPay fields on the left and you need to match these to your file column headers on the right. Highlight the ParentPay Header on the left > highlight the file field (heading) on the right and Click Map to move the mapped fields to the bottom of the screen.

IMPORTANT There are a few fields you need to amend the Key for:

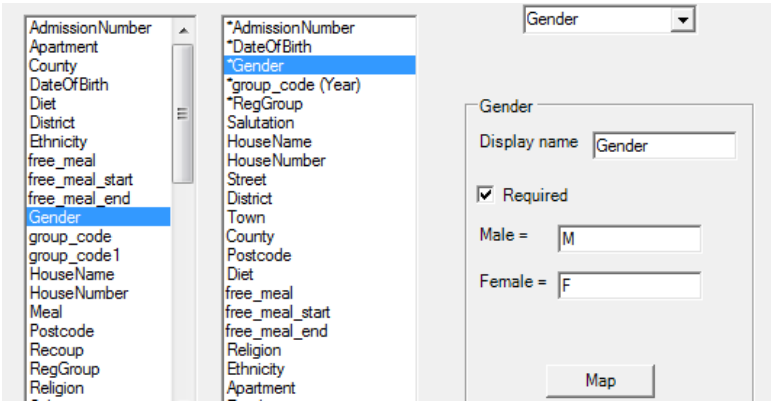
ADMISSION NUMBER – you need to select Admission number from the left and your Admission number/Pupil Id from the right but before you MAP these fields you need to tick the REQUIRED box to ensure the Admission Numbers are padded to 6 digits – you can then click MAP.



GENDER – you need to select Gender from both columns > tick REQUIRED in the KEY and enter M for Male and F for Female.



FREE MEAL – you need to select Free Meal from both columns > tick REQUIRED in the KEY and enter T for True and F for False.



Once you are confident you have mapped all of the required fields click Save.

Uploading Pupil data

Following the initial set up of your mapping, to refresh the information in MIS:Sync and in future to add any new pupils etc., you just need to login to MIS:Sync:

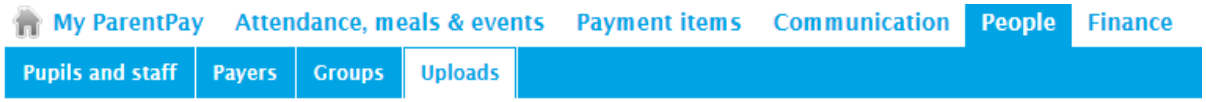
- Click on **Pupils>Manual** update
- Select your new pupil file
- Select the Mapping you created previously
- Click **IMPORT**
- Check the data looks correct
- Click **UPLOAD**

The data will be re-uploaded and your changes will be made

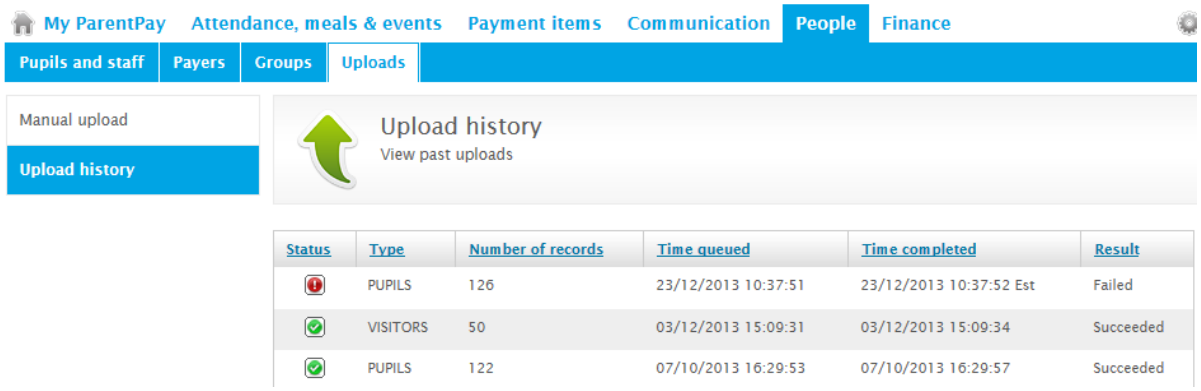
Problems with pupil uploads (all MIS systems)

In the event that you experience problems with your upload you can check the status of the upload on the ParentPay website.

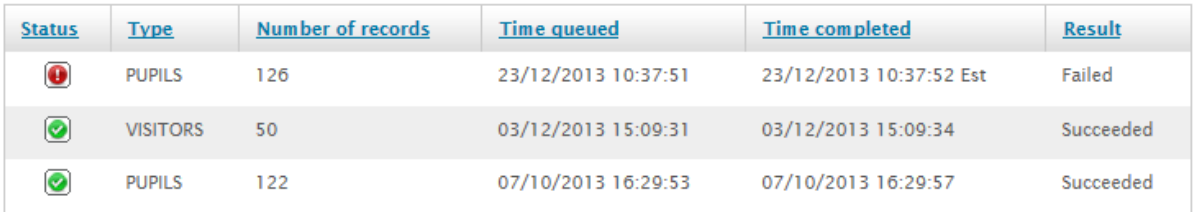
To do this go to **People>Uploads**



Go to **Upload history**



Click the icon in the 'status' column for the failed upload



A page will appear telling you the problem with the upload, if it is possible to do so you can rectify the problems and attempt to upload the file again.

If the upload still fails, please upload your file securely to the secure file share area via **Communication>Files** and contact the support team for assistance.

NB: due to Data Protection requirements we will not accept files sent via email.

Pre-admission uploads for SIMS schools

You need to ensure that your pre-admissions in SIMS have a UPN and have 'Accepted' status.

MIS:Sync has been designed to import pre-admission pupils if they have a permanent UPN number and the status of Accepted. The permanent UPN number acts as the unique identifier prior to the pupils being given their unique Admission Number.

In September the system will automatically match the permanent UPN number to the pupil account. The pupil id will be replaced with the Admission Number and the account will move out of Pre-Admission and into the Pupil section. This will ensure that any payment data and the parent login is retained and carried over to the Pupil account.

To upload pre-admission pupils

- Log into MIS:Sync
- Click on **Pre-admissions**>**Manual update**

MIS:Sync will communicate with SIMS and display a list of all the pre-admission pupils ready to upload.

- Click **Upload.**

Pre Admission Uploads for Other MIS users

ParentPay support will need to upload pre admission pupils for any schools that do not have a SIMS Management Information system. **Please contact the Service Desk to obtain the template you need to complete.**

NB: We can only upload your pre-admission data once so please do not send us your pre admission file until you are aware it contains ALL of the pre admission pupils you want uploading.

The compulsory data we will need is:

- UPN Number
- Surname
- Forename
- DOB
- Gender

Once you have complete the template with your pre-admission data Run your pupil report in your MIS system and then copy and paste the data into your Pupil template created using the mapping guidance.

Upload to ParentPay:

- Log into ParentPay
- Go to **Pupils>Upload**
- Click **Browse**
- Locate the your pupil template file
- Click **Upload**

MIS:Sync and scheduled updates

Whilst it is possible to set automated updates using Windows Scheduler, it is not something ParentPay recommend.

If you want automated updates from SIMS, MIS:Sync can be launched in what is called GUI-less mode. This will allow MIS:Sync to perform the update routine and quit automatically. To invoke the GUI-less mode you will need to tell MIS:Sync with the command line switch `/quiet`.

When you install MIS:Sync the default to perform a SIMS extraction and upload is `/sims`. To extract data from SIMS in GUI-less mode, MIS:Sync needs to be installed in the normal manner. Please follow the installation instructions and carry out a successful upload from SIMS to ParentPay. Using `/sims` implicitly uses `/quiet`. All user names and password are encrypted within MIS:Sync's password file. You will not need to specify the application password at the command line in plain text!

MIS:Sync will run the /sims routine without its password because none of the sensitive information protected by the application password can be viewed or changed while in GUI-less mode. Activity logs and error message are stored in the logs folder within the configuration settings folder. These logs should be monitored to ensure the GUI-less process is correctly set-up and continuing to send and receive data correctly.

In addition to the automated SIMS upload there is now a feature that can perform the same operation for none SIMS users. There are slightly more command line options needed, missing a single one will cause MIS:Sync to ignore them and start up normally.

The command line to use for a non SIMS upload is `/nonsimsupload` but for it to work you will also need to specify two other parameters, a mapping to use and the name and location of the file to be read. e.g. /`mapping=xxxx /datafile="c:\my stuff\xxx.xml"`. not forgetting the quotes around any path that has a space in.
For reference use the following example as a short cut or for the windows **scheduler** command

```
"c:\program files\parentpay\missync\missync.exe" /nonesimsupload /mapping=M
y``Map /datafile="c:\my stuff\My``File.csv"
```

Adding a scheduled task in windows

Open the scheduled tasks window from control panel or accessories and select add a scheduled task.

The wizard will show you six screens as documented below, the seventh is an advanced properties screen to allow the addition of the GUI-less switches.

Screen 1 – Welcome screen
Click next to continue.

Screen 2 – Application selection
Find MIS:Sync on the list and click next to continue.

Screen 3 – Name and schedule
Enter a name for the task and select an option for how often the task will be run. Click next to continue.

Screen 4 – Time to run
For better performance it is recommended that you **schedule** the task to run during the night. If you are setting up several **schedules** for uploading different SIMS data extracts then it is recommended to space them out by at least 5 minutes. Click next to continue.

Screen 5 – Account information
Enter the user name and password of the Windows user account that this task will run as. This should be the user who installed MIS:Sync e.g. Administrator.

Screen 6 – Confirmation of the task's details
Before confirming the details of the task check the "Open advanced properties" option.

Screen 7 – Advanced properties
In the Task tab add the command switches you require to the end of the executable file name in the Run option. For an automated SIMS upload you will need to add `/quiet /sims`. Click OK to close the properties window.

Pitfalls

- Access violation when setting up the **schedule**: path to program needs to be in double quotes e.g.
  `"C:\program Files\ParentPay\MISSync.exe" /quiet /sims`
- There must not be white space surrounding the equal signs in any of the parameters

Importing/managing staff and visitors

Adding Staff for the first time

Please note, if you are using our data capture module in conjunction with your cashless catering system you may need to import your staff data from the till system to ParentPay to ensure the ID's match. If you are unsure, please contact ParentPay support for assistance.

Login to **MIS:Sync:**

- Go to **File>Create import template file**
- Name the file and save locally to your computer
- Locate and open the file on your computer
- Click on the **Staff tab** in the template
- Copy and paste your staff data from your existing Excel file/manually enter the details in the template (You need to ensure you list a group and sub group against each staff member, we would suggest putting STAFF for both group and sub-group)
- Click **Save**

Go back into **MIS:Sync**:

- Click **Staff>Manage Data**
- Click on the **Import Tab**
- Click in the **radial box "File"**
- Click on the **Yellow folder** to Browse for your file
- Select the file type "Excel template .xls" and locate your file
- Click **Open**
- Click **Import**
- Go to the **Manage tab** and check all the information is as you expect, remember to **Save** any additions/deletions that you make
- This will take you to the **Upload tab**
- In the **Export section**, click in the **radial box alongside "ParentPay website"**
- Click **Export**

Your staff will now upload to your ParentPay site.

NB: for future updates you will need to first Import your staff from the ParentPay website use the Manage tab to add/delete staff and then Export the data back to ParentPay in order to update.

Adding Visitors for the first time

Login to **MIS:Sync**

- Go to **File>Create import template file**
- Name the file and save locally to your computer
- Locate and open the file on your computer
- Click on the **Visitors tab** in the template
- Enter the details in the template
- Click **Save**

Go back into **MIS:Sync**

- Click **Visitor>Manage Data**
- Click on the **Import Tab**
- Click in the **radial box "File"**
- Click on the **Yellow folder** to Browse for your file
- Select the file type "Excel template .xls" and locate your file
- Click **Open**
- Click **Import**
- Go to the **Manage tab** and check all the information is as you expect, remember
- to **Save** any additions/deletions that you make
- This will take you to the **Upload tab**
- In the **Export section**, click in the **radial box alongside "ParentPay website"**
- Click **Export**

Your visitors will now upload to your ParentPay site.

Updating Staff and Visitors

Login to **MIS:Sync**

- Click **Staff(or Visitor)>Manage Data**
- Click on the **Import Tab**
- Ensure the **Import from ParentPay web site** box is ticked
- Click **Import**

You will receive notification of how many staff or visitors have been imported into MIS:Sync from your ParentPay site

- Go to the **Manage tab** and add, amend or delete your Staff/Visitor accounts *(remember to give any new staff/visitors a unique Id)*
- Click **Save - t**his will take you to the **Upload tab**
- Ensure the **Export to ParentPay web site** is ticked
- Click **Export**

You will receive a notification confirming your changes

Troubleshooting

- If your staff or visitor upload fails the likely reason for this is that you are attempting to use a duplicated Id. Follow the above process and edit the Id to ensure there are no duplications and re-attempt the export.

Site management

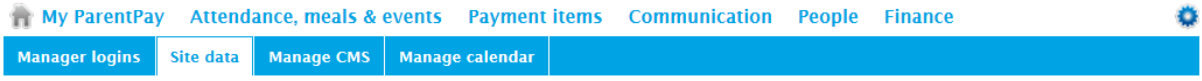
Personalise your site

Your home page is the first thing that parents see when they login to make a payment. Many schools use this to communicate important messages and encourage parents to engage in other relevant communications. ParentPay refers to this text as your "public description".

Do not forget to click **Save** each time you make a change via this screen.

Edit home page text

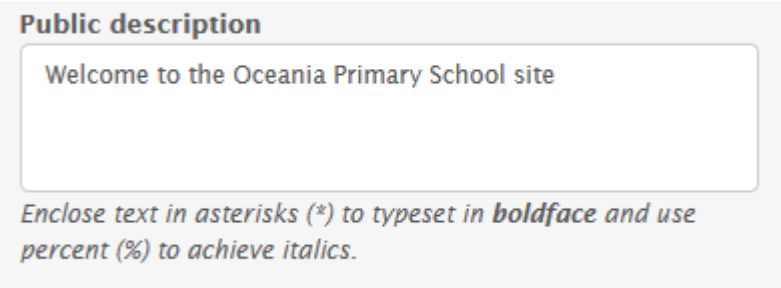
Click on **Settings (the little cogwheel on the right-hand side of the screen)>Site data**



Go to the **Public description** field in the **Company information section**.

You can edit your **Public description** as often as you like. Try making your text interesting by using different styles and links to relevant information.

- Using bold/italics: for bold use * **in front of and after** * the text; for italics use % *in front of and after* % the text
- To link to other websites or documents placed on your own website, simply enter the full website address, i.e. **http://www.parentpay.com/file**
- To link to an email address use the format **mailto:office@myschool.com**

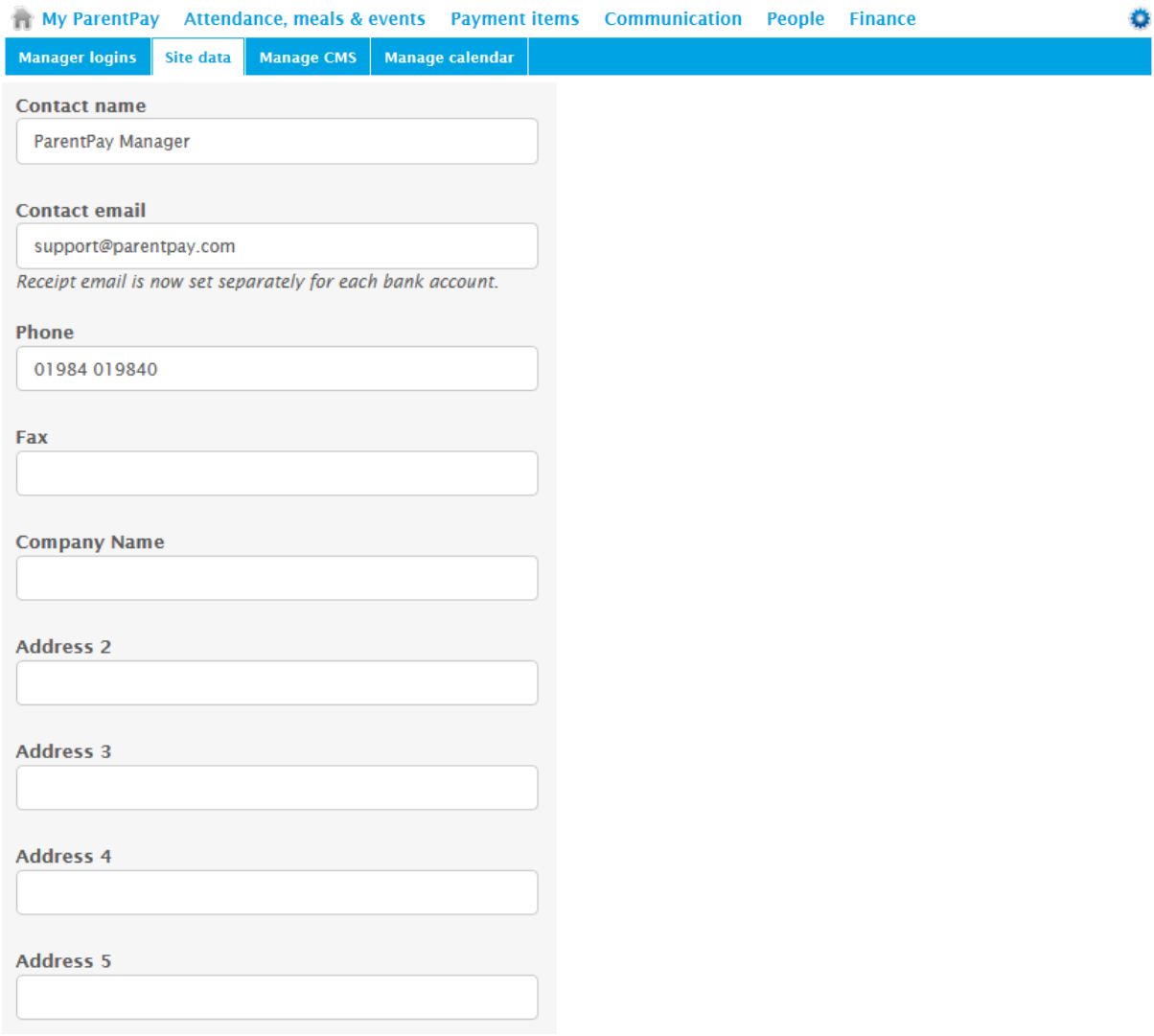

Public description
Welcome to the Oceania Primary School site
Enclose text in asterisks (*) to typeset in boldface and use percent (%) to achieve italics.

Click **Save.**

Enter school contact details

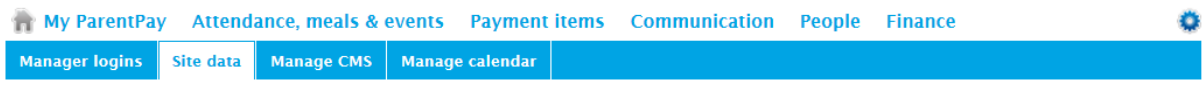
Enter your contact details and ensure that your school's address, main contact email address and contact numbers are correct. The email address you supply here will be used by ParentPay to contact you and will also be the email address that replies to emails you send your parents using our communication centre.

Go to **Settings>Site data** and complete the relevant fields in the **Company information section.**



Click **Save.**

Upload your school logo

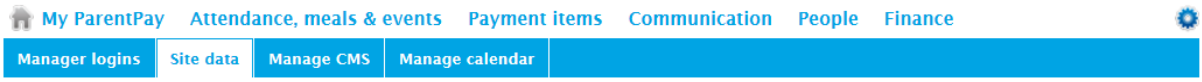


Go to **Settings>Site data**, in the **Company settings section** click on the **Browse** button to the right of the **Logo** box. Locate your logo on your computer and click **Open**. We recommend files no larger than 150 x 135 pixels in size, the following formats are supported: gif, jpg, jpeg or png. **NB** logos in a word document cannot be uploaded. Click **Save**.

If your logo does not appear immediately, logout and log back in to reset your site.

Contact details update email

Your site will default to 'Opt in' to receive notification emails when Parents/Carers have updated their contact details online when setup. If you would like to 'Opt out' simply:



- Go to **Settings>Site data>Feature opt out**
- Un-tick the **Contact details update email** option

You will also be able to view a report showing the information you hold in your MIS versus the information supplied in ParentPay by parents via Communication>Manage contacts>Individual contacts.

User messaging

Parents are able to send you messages from within their ParentPay login, these messages are sent directly to your ParentPay site via our servers not via email, if you do not want your parents to have this facility please do as follows:

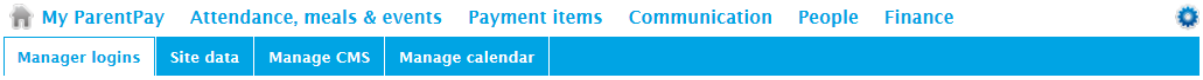
- Go to **Settings>Site data>Feature opt out**
- Un-tick the **User messaging** option

Add/remove managers

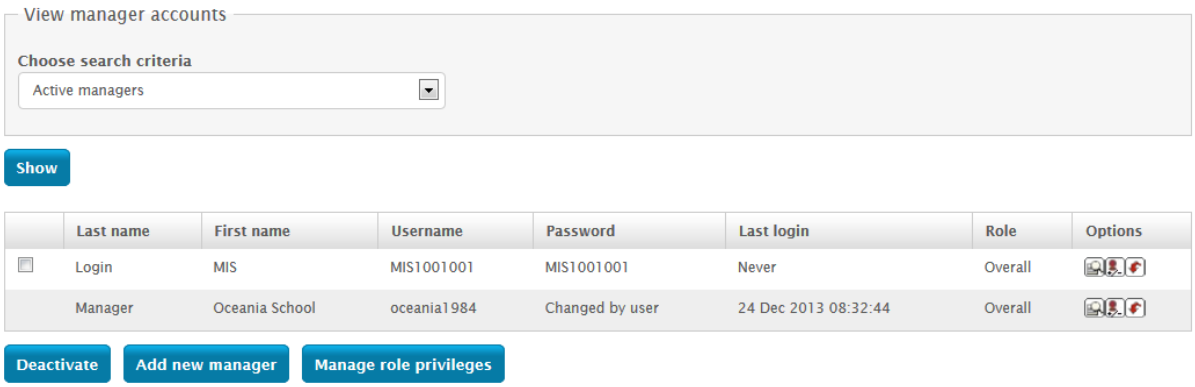
You can add as many school managers as you need with varying access rights referred to as 'roles' in ParentPay. Remember to 'deactivate' a manager if they leave the school.

Add a new manager

Click on **Settings>Manager**



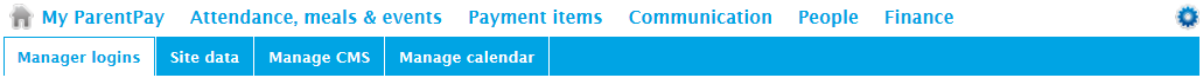
- Click **Add new manager**
- Type the relevant information in the following mandatory fields:
  - Title
  - Forename
  - Surname
  - Email address
- Type a username for your new manager in the **Username** field
- Type a password for your new manager in the **New password** field and re-type it in the **Confirm password** field
- Click **Save**



NB: passwords must be at least 6 characters long and include one number and one letter.

Set manager role

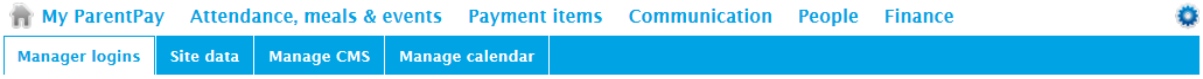
Go to **Settings>Manager**



- Locate the manager on-screen
- Click on the second icon in the **Actions** column **'Manager role'**
- **Choose new role** using the drop down list
- Click **Save new role**

Deactivate a manager

Go to **Settings>Manager**

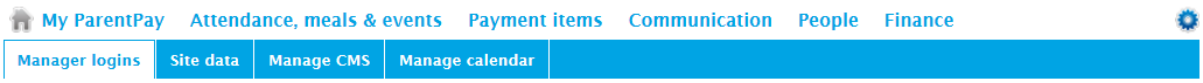


- Locate the manager on-screen
- **Tick** the box to the left of the manager
- Click **Deactivate**

The manager will disappear from your 'Active manager's' screen. You can also 're-activate' a manager if needed.

Re-activate a manager

Go to **Settings>Manager**



- Use the drop down list alongside **Choose search criteria** to select **'Non active managers'**
- Click **Show**
- Locate the manager on-screen
- **Tick** the box to the left of the manager
- Click **Activate**

Calendars

You can manage your Academic years, Financial years, Term dates and closing days in ParentPay ensuring your system is always up to date.

Go to **Settings>Calendar**

Manage financial year

Choose financial year – use the drop down menu to check if your financial year has already been setup, if not:

- Click **Choose**
- **Name** your financial year i.e. 2012-2013
- Enter the **Start and End dates**
- Click **Save**

Manage term dates

Choose academic year – use the drop down menu to select your academic year

- Click **Choose**
- Enter your half term **Start and End dates** for the whole year in the period sections
- Click **Save**

Manage closing days

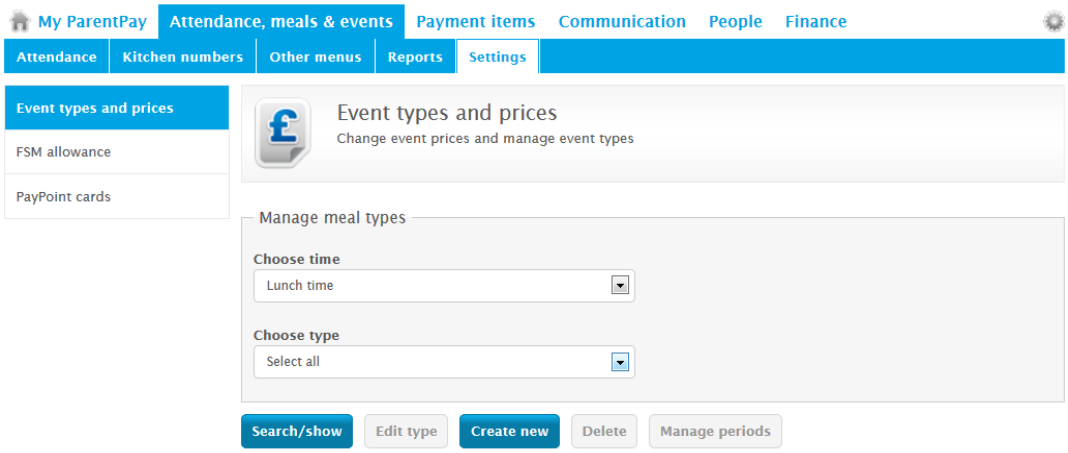
Choose academic year – use the drop down menu to select your academic year

- Click **New**
- Click **Choose**
- Enter the **Start and End date** for your Inset/occasional closing day
- Click **Save**

Meal types

If you are using ParentPay Dinner Money™, you will need to set up 'meal types' so that ParentPay knows what to charge for what type of meal.

Go to **Attendance, meals & events>Settings>Event types and prices**



Click **Search/show** to check if any meal types have already been set up.

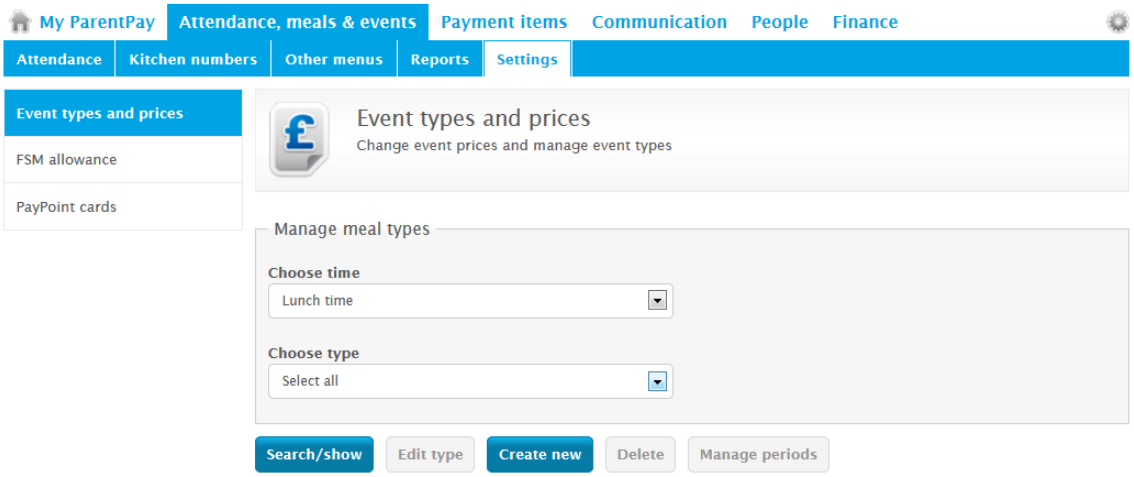
Set up a new meal type

- **Choose time:** use the drop down list to select the meal time
- Click **Create new**
- **Event type name:** name your meal type i.e. Pupil meal, Staff meal
- **Tick Count as plate** to tell ParentPay to deduct the price of the meal when taken
- **Choose** an appropriate **'plate size'**
- **FSM Related:** when creating a Lunch Time meal type the FSM Related box will be ticked automatically to ensure that the FSM entitlement (or UIFSM entitlement) is deducted when FSM (or UIFSM) pupils take a meal.
- **Available for:** tick the boxes to tell ParentPay which groups the meal type is associated with
- **Default type:** if you are setting up a 'pupil meal' type item, it may be that you want this to be the default type. In the attendance screen tick the box – NB: you can only have ONE default type
- **Archived:** if at any time you wish to archive the meal type you can do so by ticking this box
- **Display options: Event colour and Event icon** – both are designed to make it easy for you to identify the meal type you need when using the toggle function in our attendance screen
- Click **Save**

Set period for new meal type

- Use the drop down list to **'Choose time'**
- Use the drop down list to **'Choose type'** (the meal type you have just set up)
- Click **Manage periods**
- Complete all the fields
- **Select the payment item** the meal type is associated to using the drop down list
- Click **Save**

Check your new meal type



- Click on **Attendance, meals & events>Settings>Event types and Prices**
- **Choose time:** select ALL from the drop down list
- Click **Search/show**

Edit/delete meal type/price

- Select the time from the drop down list alongside **'Choose time'**
- Select the type from the drop down list alongside **'Choose type'**
- Click **Manage periods**
- **Edit** your period by clicking on the **Edit period** icon in the **Actions** column
- **Add a new period** if the price changes (e.g. mid-year), simply type in your start date and end date, price etc. This will overwrite the previous period date if applicable.

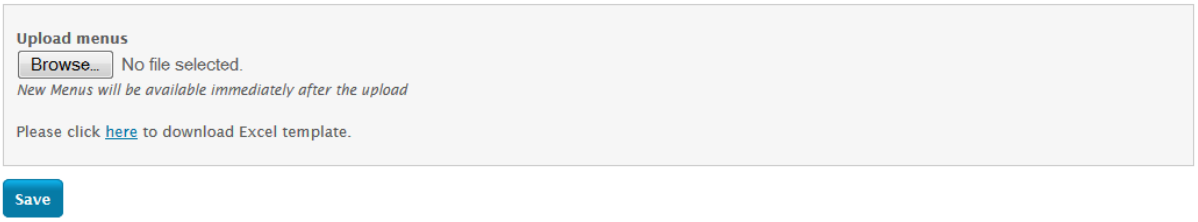
School menus

You can upload your menus to ParentPay and enable your parents to view what is on offer from their ParentPay account.
If you are using our data capture module with a cashless catering till system, it may be that your till provider can feed the menu information into ParentPay from the till, please contact the ParentPay support team for confirmation.

Upload your menus

Click **Attendance, meals & events>Other menus**

You will see a link on this page directing you to the Excel Template **"Please click here to download Excel template"**.
When you open the Excel template it will open on the **Help** tab within the workbook, read and follow the instructions for completing the **Menus, Cycle** and **Schools** template tabs. Once complete click **File>Save as** and save to your PC as an Excel file.
Go back to **Attendance, meals & events>Other menus** in ParentPay



Click on **Browse** to locate your menu template, click **Open** and click **Save**

Linking the static menu tab to your own online menus

You can also link to your school menus that you have hosted on your own/your caterer website from the menu tab in ParentPay – contact ParentPay support if you wish to link to menus on another site.

FSM allowance

This screen is used to set FSM allowances for your till system to use – this is only used by a limited number of cashless catering till systems.
When the allowance is set, a pupil can purchase items at a higher value than their FSM allowance, upon purchase the till will deduct the allowance as set in ParentPay and the balance is charged to the child's school meal account.
This is an important part of some school setups therefore if this option is appropriate for your school the ParentPay support team will action this for you during your setup process.

Managing school bank accounts

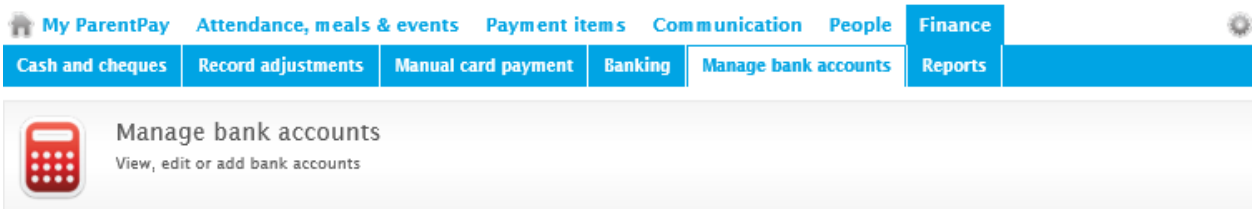
Before you get started, there is some terminology you will need to know in order to understand your bank accounts in ParentPay:

Payee: The name of the organisation that 'owns' the funds and the bank account such as school, caterer, Local Authority or other 3rd party provider

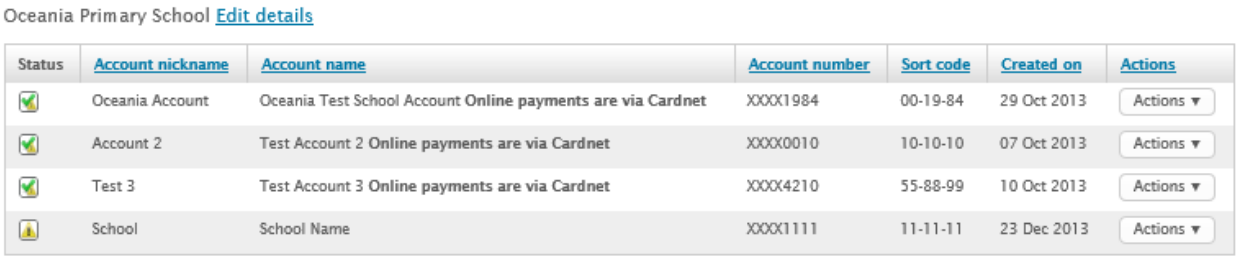
Bank account: Name of the bank account owned by a **'Payee'** linked to your site

View bank accounts linked to your site

Go to **Finance> Manage Bank accounts**



All bank accounts linked to your site will be grouped by 'Payee' and a list 'bank accounts' linked to your site for that payee will be listed within that payee area. An explanation of the key columns is detailed below the Icons.



Status: icons in the **'Status column'** will indicate if those bank accounts are:

Live and approved: payers are able to pay for payment items linked to this bank account and money can be settled to the bank account.

Live awaiting approval: payers are able to pay for payment items linked to this bank account but money **CAN NOT** be settled to the account until approval received by ParentPay.

Awaiting approval from ParentPay: bank account can be linked to payment items, however payers cannot pay against those services or money be settled for those payment items until the account is approved.

Please confirm details: bank account has been setup but you have not confirmed the information supplied is correct therefore you are unable to link it to any payment items. You need to click on **View/edit this account** and click on **Edit these details** in the **'Account details'** area on screen in order to confirm the account details are correct.

Account nickname: how you want to refer to your bank account in ParentPay to ensure users know which account it is.

Account name: the name of the bank account as it appears on your bank statement, cheque book etc.

What does 'Online payments are via Cardnet' mean? In the event that the **'Account name'** column displays the above text, this indicates that you have money settled to this bank account directly using your own internet merchant account not via the ParentPay collection service. As such, ParentPay do not hold your bank details, therefore you must contact your internet merchant account provider to implement any changes.

Can I switch my bank account to the ParentPay collection service? Yes you are able to switch to the ParentPay collection service. Please contact the Service Desk Team who will be able to assess your present account and advise you of the best process to switch over.

Adding bank accounts

In order for a new bank account to receive income through the ParentPay Collection Service it needs to be fully approved. This includes the school providing ParentPay with evidence of ownership of the bank account.

Evidence you need to provide to ParentPay

Evidence should be a scanned & emailed or a faxed copy of one of the following:

- Bank Account Statement
- Cheque
- Confirmation letter from bank (less than 28 days old, including contact details of the bank)

These should be sent to:

Email: banking@parentpay.com or Faxed: 01278 501070

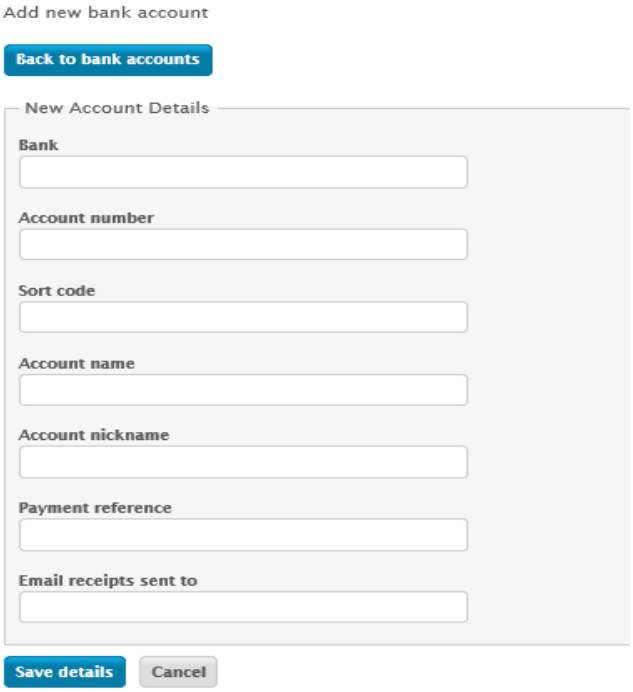
The evidence needs to clearly show the account number, sort code, school (company) name and bank account name (e.g. Grange Hill High School, Grange Hill School Fund Account, 11-22-33, 123456789).

ParentPay will normally complete all approvals within 3 working days of receipt. IMPORTANT: Evidence sent later than 3 working days before the end of the settlement period (15th or last day of the month), may mean funds are not settled to the school until the next settlement run.

Please contact the Service Desk Team with any questions.

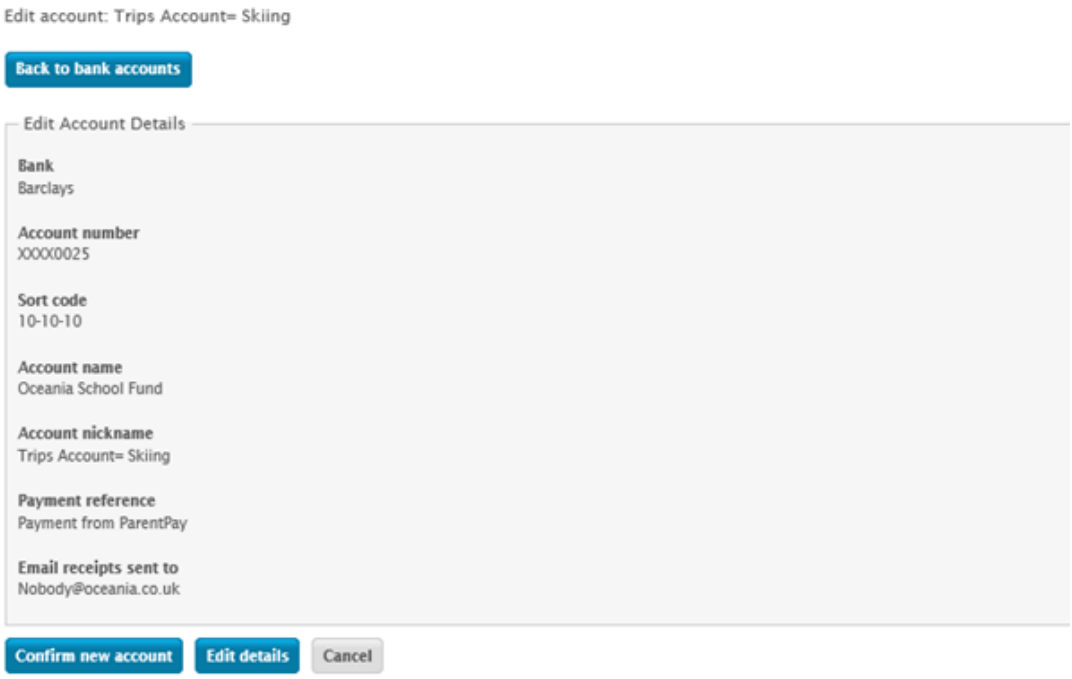
How to add your new bank account

Go to **Finance>Manage Bank accounts** and click on



Complete all the requested information and click **Save these details**.

An overview of the details of the bank account you are adding will show on screen, check the details are correct and click **Confirm new account**.

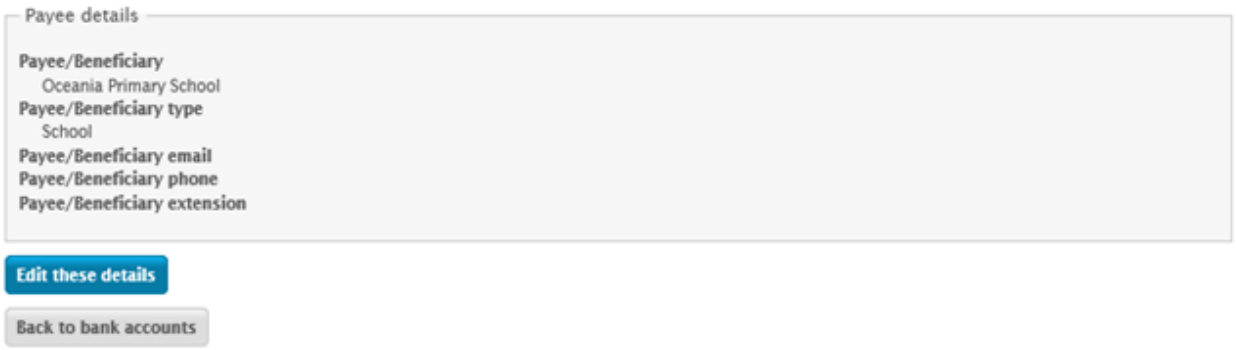


In the event that you notice a mistake, click on **Edit details**, to make your amendments then click **Confirm new account**.

Confirmation of your new account details will appear on screen with the status of **'Awaiting approval by ParentPay'** which means your newly added account has been submitted to:

a) ParentPay support team to enable payments to be made to payment items associated with this bank account
b) ParentPay settlements team for confirmation that the account details are correct in order to provide approval for the account to have payments settled to it.

If at this stage, you click on **Edit these details** in the **Account details** area, you will only be able to change the 'Account nickname', 'Account reference' and 'Email receipts sent to' fields.



If you are the 'Payee' and therefore the owner of the bank account, you can change the **'Payee details'** (contact information) at any time click on **Edit these details** in the **Payee details** area.

You can only edit the 'Payee/beneficiary email', 'Payee/beneficiary phone' and 'Payee/beneficiary extension'.

Once finished, click **Save these details**.

Collection service statements and invoices

Payment settlement

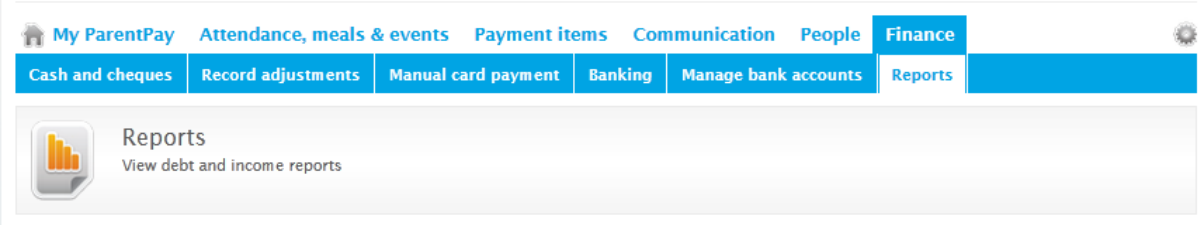
Payments are settled in batches twice-monthly and those are payments made that have been **processed** during the periods: 1st to 15th and 16th to end of each month. Payments to be credited to your nominated accounts usually leave the Collection Service account within 5 working days of the above dates. Payments credited to you will appear with one of the following references on your bank statement: ParentPay Funds, Cardnet Funds or PayPoint Funds.

Settlement statements

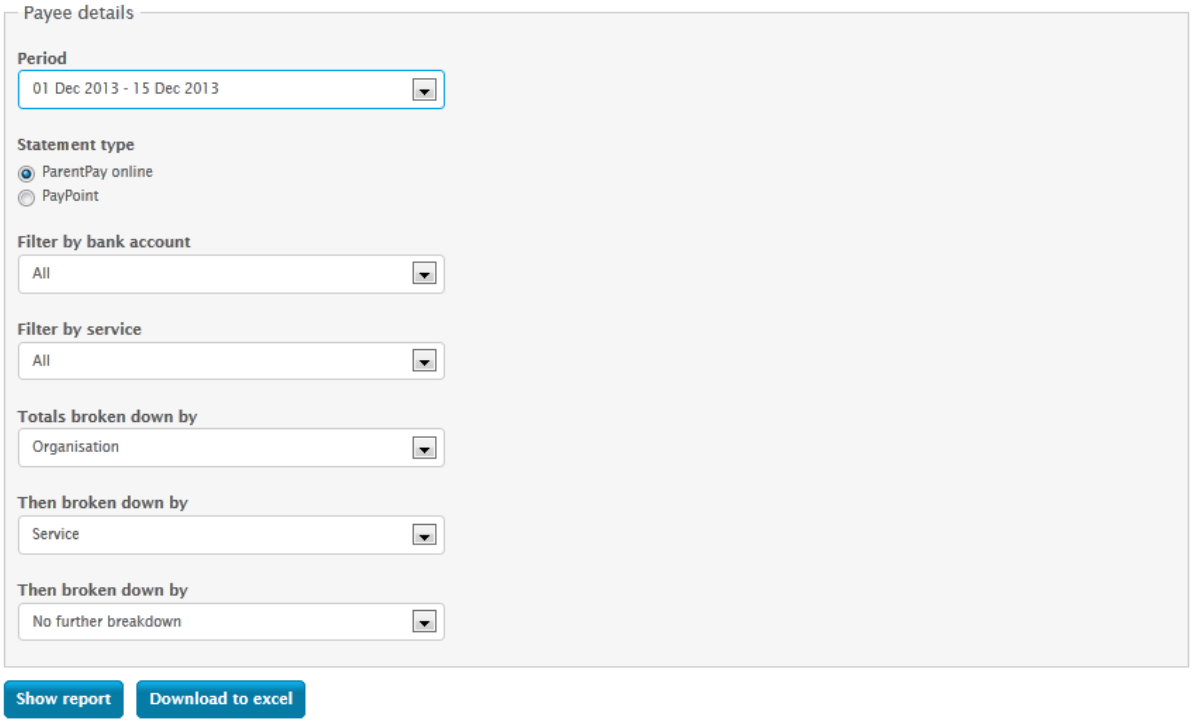
Statements relating to the settlement/s you receive are published online twice a month from 1st – 15th of the month and then from 16th to the end of the month. These include a breakdown by individual service item, card type and associated total transaction fees. Schools that have their own internet merchant account for direct settlement, should confirm with their provider the frequency of settlement payments.

Viewing ParentPay collection service settlement statements

You can access your settlement statements quickly and easily for each bank account: Go to **Finance>Reports**



Click on the **Collection Service Statements**



Period: select the period of the settlement you need a statement for
Statement type: Cards (online payments) or PayPoint
Filter by bank account: check the bank account you want the statement for is correct
Filter by Payment Item: select an individual payment item to report on or leave as All for a report across all payment items linked to that bank account
Totals broken down by: use these drop down menus to define how your report will show

Click **Show report**

Oceania Primary School 01 Dec 2013 – 15 Dec 2013

Statement type
Cardnet

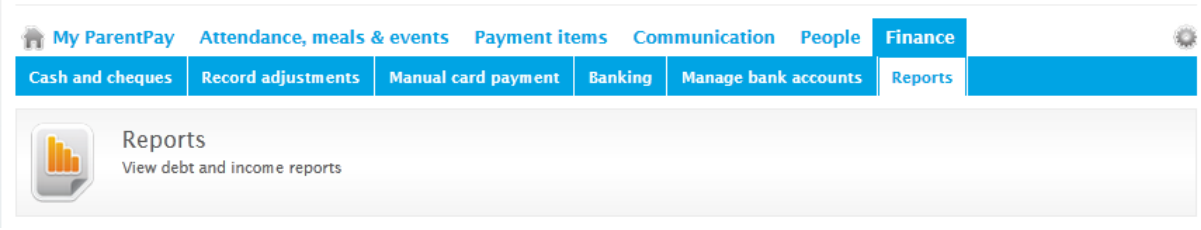
Organisation	Service	Total paid	Total refunds	Paid less refunds	Txn fees	Vat on fees	Net settlement
Oceania Pri School	School Meals	£1,716.00	£20.00	£1,696.00	£29.96	£5.98	£1,660.06
Oceania Pri School	Total	£1,716.00	£20.00	£1,696.00	£29.96	£5.98	£1,660.06
Total		*£1,716.00*	*£20.00*	*£1,696.00*	*£29.96*	*£5.98*	*£1,660.06*

VAT Invoices

VAT on transaction fees

VAT invoices are available for you to download once payment has been settled.

Go to **Finance>Reports**

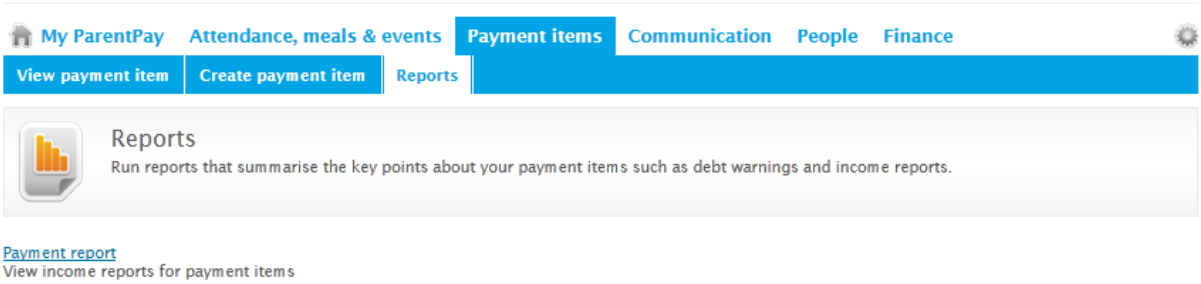


Select **Collection Service Invoices** and clink on the **link** to access the relevant invoice you require.

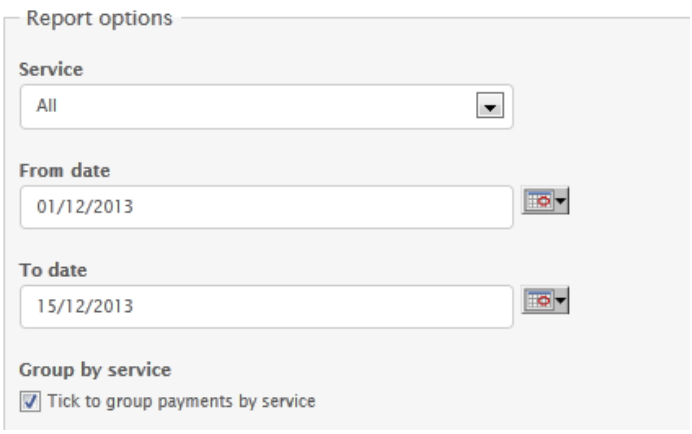
Reconciling your settlement statements

You can run a payments report in ParentPay to show the 'gross' amount collected in the settlement period, this will match the 'Total paid' column in the settlement report

Go to **Payment Items>Reports** and select **Payment Report**

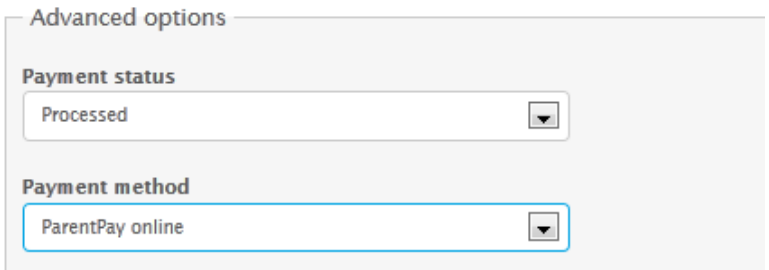


Payment Item: choose an individual payment item or leave as All
From date: 1 or 16 of the month (depending on the period you need to reconcile)
To date: 15 or last day of the month (depending on the period you need to reconcile)



Click on **Advanced options**

Payment status: select Processed in order to only capture payments that have been settled to you
Payment method: choose 'ParentPay Online' or 'PayPoint' according to the settlement statement you are reconciling



Use the tick boxes to define what other information you want to include in your report such as the bank account the payments were directed to and click **Search**

Payment Items

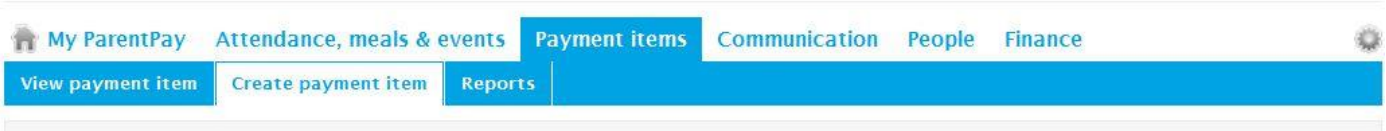
An Overview of Payment Items

There are a multitude of payment item types available to you as outlined below:

Once only, fixed amount	fixed cost for one-time payment
Once only, variable amount	one-time payment, the parent selects the amount to pay within the limit set by the school
Repeatable, fixed amount	fixed cost for regular payment
Repeatable, variable amount	regular payment, the parent selects the amount to pay within the limit set by the school
Once only, fixed with quantity	parent selects quantity at fixed unit cost for one-time payment within the limit set by the school
Once only, variable with quantity	parent selects quantity and unit cost for one-time payment within the limit set by the school
Repeatable, fixed with quantity	regular payment, the parent selects quantity at fixed unit cost within the limit set by the school
Repeatable, variable with quantity	regular payment, the parent selects quantity and unit cost within the limit set by the school
Once only, limited availability	a trip or item with specific availability which requires a once only payment
Repeatable, limited availability	a trip or item with specific availability but which can be purchased on multiple occasions
Partial services, reducing balance	a high value trip or event that allows parents to make regular payments and shows the balance still outstanding each time
Bookable/selectable item	a payment item that allows parents to pre-book or select meals *(this payment item can only be set up by ParentPay Technical Staff)*

How to set up a Payment Item

Once you have decided the type of payment item that suits your requirements you need, go to **Payment items>Create payment item**



- Click on **Create payment item**
- Select the payment item type
- Click **Next**

Complete the fields required for the type of payment item you are setting up, a list of the fields and what they are used for is outlined below:

Name	make sure your payment item name is relevant and clear as it will be visible to parents and visible in all your reporting
Short name	you can enter your own short name or ParentPay will generate one for you
Description	allows you to provide more information to parents about the payment item including hyperlinks to relevant websites and information
Notes field	you can choose to include an optional or mandatory notes field that parents can use to send you supplementary information about the payment item
Default amount	standard charge per pupil for the payment item; mandatory if using the **Use custom amount** option below
Variable amount	this will be ticked if you have selected a variable payment configuration for your payment item
Minimum/maximum amount	enter the minimum/maximum amounts within which parents can make a variable payment; mandatory with **Use custom amount**
Allow partial payments	this will be ticked if you have selected a partial payment configuration
Due date	Choose a date that informs parents when payment should be made by
Use due date	tick to display the due date selected above
Quantifiable	this will be ticked if you are setting up a payment item to use quantities
Default quantity	enter the prompted or suggested quantity shown to parents, parents are able to change this quantity within the limits set by the school; mandatory if using the **Quantifiable** option
Minimum/maximum quantity	sets the minimum/maximum quantity that parents can order; mandatory if using the **Quantifiable** option
Use stock control	this will be ticked if you have selected a quantifiable payment item
Availability limited to	enter total number of places/tickets available to purchase
Repayable	this will be ticked if you have selected a repeatable payment item
Require payer consent	tick this box so that your parents will be required to tick a dedicated consent box when making payment; a description of the consent can be included in your description of the payment item
Allow new item alerts	un-tick this box if you do not want ParentPay to automatically send an email to those parents associated with the payment item that have an email address in ParentPay
PayPoint barcode enabled	tick this box if you wish to be able to generate a barcoded letter for this payment item
Credit payments to	you can link your payment item to any bank account you have setup in ParentPay; select the account that you wish payments to be directed to

ParentPay also allows you to use up to six different reporting codes, if you wish to use these simply enter the information in the relevant boxes. These can be free format or selected from drop down menus. Please contact support@parentpay.com for further details.

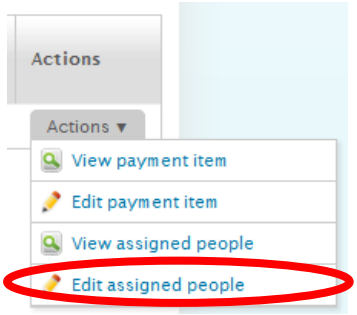
Click **Save** and click **OK**.

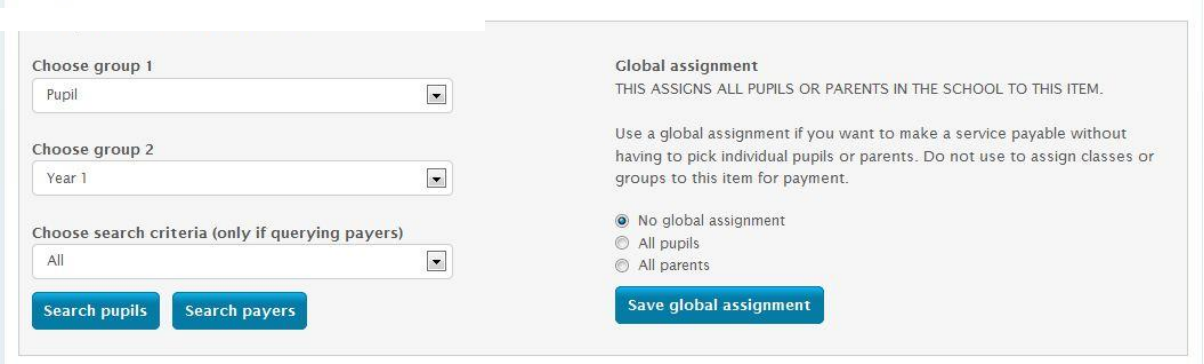
Assigning pupils/staff/payers to a payment item

Assigning pupils and staff

Go to **Payment items>View payment items**

Locate your payment item. To the right of the payment item go to **Actions > Edit assigned people**.

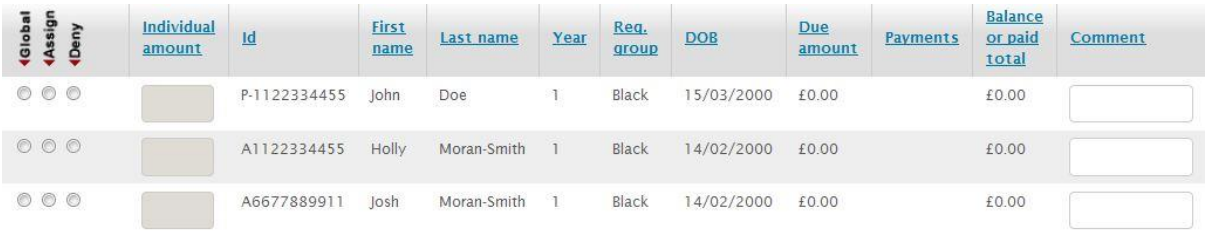



Choose group 1
Pupil
Choose group 2
Year 1
Choose search criteria (only if querying payers)
All
Search pupils
Search payers
Global assignment
THIS ASSIGNS ALL PUPILS OR PARENTS IN THE SCHOOL TO THIS ITEM.
Use a global assignment if you want to make a service payable without having to pick individual pupils or parents. Do not use to assign classes or groups to this item for payment.
No global assignment
All pupils
All parents
Save global assignment

Use the drop down menu on the left side of the screen alongside **Choose group 2** to locate the group that you wish to assign to the payment item (this can be a year group or class for pupils or your Staff group) and click **Search pupils**.

To bulk assign all pupils in the group click on the heading **Assign** in the left hand column. A green dot will appear in each radial button.

If you wish to exclude any pupils simply click in the radial box alongside their name under the **Deny** column.



Global / Assign / Deny	Individual amount	Id	First name	Last name	Year	Req. group	DOB	Due amount	Payments	Balance or paid total	Comment
		P-1122334455	John	Doe	1	Black	15/03/2000	£0.00		£0.00	
		A1122334455	Holly	Moran-Smith	1	Black	14/02/2000	£0.00		£0.00	
		A6677889911	Josh	Moran-Smith	1	Black	14/02/2000	£0.00		£0.00	

To customise the billing for individual pupils simply click in the **Individual amount** box and type in the amount you wish to charge them.

Once you have selected your pupils, scroll down to the bottom of the page and click **Save settings.**

If you wish to assign two or three year groups to a payment item you may do so by following the same steps as above.

NB: If you need to assign all pupils and staff to an item such as dinner money that all staff and pupils need to be able to make payment for, you can use the Global assignment option on the right of the screen – this will assign all people including those that are presently on ParentPay and any pupils/staff that you add to the system in the future automatically to the payment item. If you are unsure whether to set a global assignment against a payment item contact the ParentPay Service Desk Team for advice.

Now that you have assigned your pupils you need to communicate information about the payment item to your parents, you can do this quickly and easily by email or letter using ParentPay's mail merge facility. (See the ParentPay Communication Centre™ section for instructions).

Assigning payers

ParentPay refers to parents as payers. The majority of payment items will be assigned to a group of pupils. For example, if you are setting up a trip for the children in year 7, 8 and 9, then a parent who has two children in these years will be asked to make 2 payments, one for each child.

However, you may occasionally want to ask each parent to make a payment for a single item, irrespective of how many children they have at your school e.g. if you were requesting donations to the school fund.

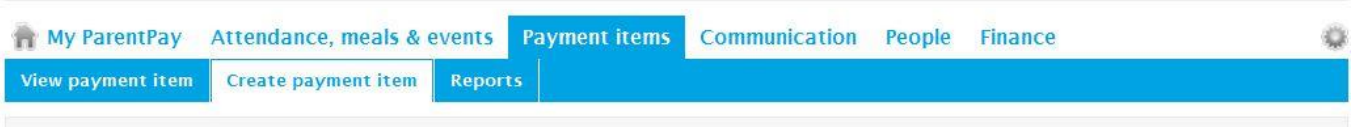
In this case, you would select the appropriate year group from the drop down menu alongside **Choose Group 2** and click on **Search Payers**. Payers are assigned in the same way as pupils; simply follow the steps previously outlined above.

Example payment items – the basics

Repeatable, variable amount payment item

Setting up a repeatable, variable amount payment item, such as dinner money, will ensure payers can make regular payments within the limit set by the school.

Go to **Payment items>View payment items**



- Click **Create Payment Item**
- Select the **Repeatable, variable amount** option using the drop down menu
- Click **Next**
- **Name:** Dinner money for XXX school
- **Description:** Enter information about your dinner money payment item such as the price of a meal where you have a fixed price, the price of a week's meals, the minimum top-up amount required etc.
- **Default amount:** £0.00 so parents can pay any amount over the minimum amount
- **Variable amount:** tick to allow payers to pay any amount between the minimum and maximum amount set
- **Minimum amount**: the minimum amount you want your parents to pay at one time
- **Maximum amount:** the maximum amount you want your parents to pay at one time
- **PayPoint barcode enable:** tick if you wish to be able to order school meal top up cards for PayPoint payments/generate barcode letters for cash based families
- **Credit payments to:** select the bank account that school meal payments are to be directed to
- Click **Save**
- Click **OK**

Once only, fixed amount payment item

Setting up a Once only, fixed amount payment item such as a school trip that's a once only fixed price:

Go to **Payment items>View payment items**

- Click **Create payment item**
- Select the **Once only, fixed amount** option using the drop down menu
- Click **Next**
- **Name:** name your payment item such as 'Trip to zoo'
- **Description:** Enter information about your trip such as the cost, time the bus leaves and returns to school etc
- **Notes field:** select the type of notes field you would like if you want your parent to send you supplementary information when making payment
- **Default amount:** Enter the cost of the trip
- **Due date:** select a date you need to receive payment by
- **Use due date:** tick
- **Require payer consent:** tick if you want your parents to tick their consent at the time of making payment
- **PayPoint barcode enable:** tick if you wish to be able to generate barcode letters for cash based families
- **Credit payments to:** select the bank account that payments are to be directed to
- Click **Save**
- Click **OK**

Once only, limited availability payment item

Setting up a Once only, limited availability payment item such as a trip or item with specific availability which requires a once only payment.

Go to **Payment items>View payment items**

- Click **Create payment item**
- Select the **Once only, limited availability** option using the drop down menu
- Click **Next**
- **Name:** name your trip such as 'Trip to Alton Towers'
- **Description:** Enter information about your trip such as the cost, time the bus leaves and returns to school, limited places etc
- **Notes field:** select the type of notes field you would like if you want your parent to send you supplementary information when making payment
- **Default amount:** Enter the cost of the trip
- **Due date:** select a date you need to receive payment by
- **Use due date:** tick
- **Quantifiable:** this will be ticked
- **Default quantity:** enter your default allocation i.e. 1
- **Minimum quantity:** minimum number of places available i.e. 1
- **Maximum quantity:** maximum number of places available i.e. 1
- **Use stock control:** ticked
- **Availability limited to:** enter the total number of places available i.e. 25
- **Require payer consent:** tick if you want your parents to tick their consent at the time of making payment
- **PayPoint barcode enable:** tick if you wish to be able to generate barcode letters for cash based families
- **Credit payments to:** select the bank account that payments will be directed to
- Click **Save**
- Click **OK**

Repeatable, limited availability payment item

You can setup a Repeatable, limited availability payment item with quantity for items such as tickets for a production with limited places available and even two price bands.

Go to **Payment items>View payment items**

- Click **Create payment item**
- Select the **Repeatable, limited availability** option
- Click **Next**
- **Name:** name your payment item such as 'Tickets for Christmas Production'
- **Description:** Enter information about your first price banded tickets
- **Default amount:** Enter the cost of the first price band tickets
- **Due date:** select a date you need to receive payment by
- **Use due date:** tick
- **Quantifiable:** this will be ticked
- **Default quantity:** enter your default allocation i.e. 0
- **Minimum quantity:** minimum number of places available i.e. 1
- **Maximum quantity:** maximum number of places available i.e. 4
- **Use stock control:** ticked
- **Availability limited to:** enter the total number of places available i.e. 50
- **Credit payments to:** select the bank account that payments are to be directed to
- Click **Save**
- Click **OK**

If collecting money for tickets with two price bands, you will now need to repeat the above process for your concession/child priced tickets.

Parents will then be able to purchase Full Priced or Concession tickets as per your payment item setup.

Depending on the types of tickets parents purchase initially, you may need to alter the availability on both payment items i.e. if more Full Prices Tickets are sold you may want to reduce the availability of the Concession tickets and increase the availability of the Full Priced Tickets to ensure you sell your total ticket allocation.

Partial services/reducing balance payment item

Setting up a Partial services/reducing balance payment item such as a high value trip or event that allows parents to make regular payments and shows the reducing balance outstanding.

Go to **Payment items>View payment items**

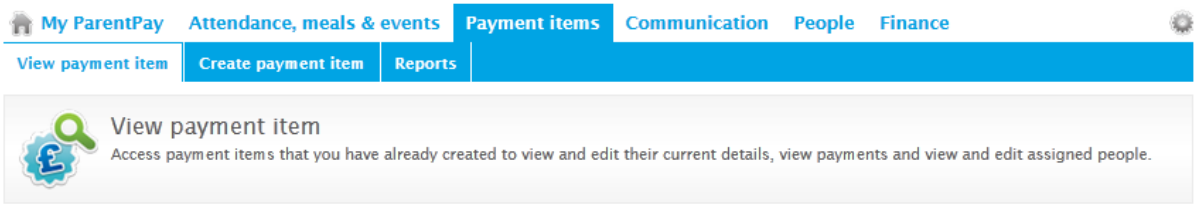
- Click **Create payment item**
- Select the **Partial services/reducing** balance option using the drop down menu
- Click **Next**
- **Name:** name your trip such as 'Visit to Isle of Wight'
- **Description:** Enter information about your trip such as the cost, installment information etc
- **Notes field:** select the type of notes field you would like if you want your parent to send you supplementary information when making payment
- **Default amount:** enter the **Maximum amount** of the trip
- **Variable amount:** will be ticked
- **Minimum amount:** minimum online payment i.e. £25.00
- **Maximum amount:** enter the total cost of the trip
- **Allow partial payments:** tick
- **Due date:** select a date you need to receive payment by
- **Use due date:** tick
- **Require payer consent:** tick if you want your parents to tick their consent at the time of making payment
- **PayPoint barcode enable:** tick if you wish to be able to generate barcode letters for cash based families
- **Credit payments to:** select the bank account that payments will be directed to
- Click **Save**
- Click **OK**

Editing a 'live' payment item

Once you have setup a payment item you may edit the details any time you wish.

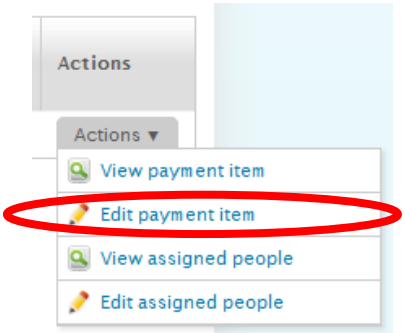
Schools have the opportunity to change the bank account linked to a live payment item and can even set a future date they wish the change to take place i.e the date that funds will be settled to the new account from.

Click on **Payment items>View payment items**


My ParentPay
Attendance, meals & events
Payment items
Communication
People
Finance
View payment item
Create payment item
Reports
View payment item
Access payment items that you have already created to view and edit their current details, view payments and view and edit assigned people.

Click to **Search** all live payment items

Locate your payment item on screen, in the right hand column go to **Actions > Edit payment item**.



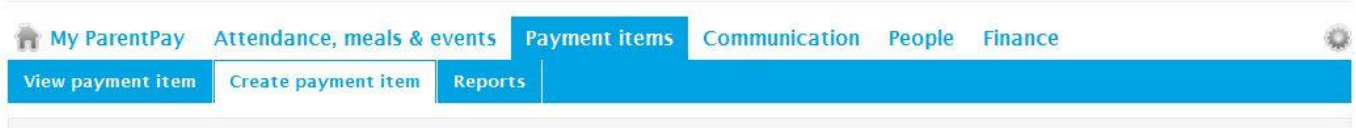
Make any changes necessary and click **Save**.

IMPORTANT - once a payment item has expired and you have finished taking money and reporting on it you can archive the payment item. To do this you will need to place a tick in the **Archive** box on the payment item setup screen. Schools are unable to archive a meal/event type related payment item such as dinner money or a breakfast club. You will need to contact our service desk should you wish to archive this type of payment item.

To un-archive a payment item simply select **Archives Payment Items** from the drop down menu in the View payment items screen. Select **Edit payment item** from the drop down menu next to the payment item, **un-tick the Archive box** and click **Save**.

Changing the bank account linked to a live payment item

Go to **Payment items>View payment items**



- Click **Search**
- Locate the payment item that you need to change the bank account funds are directed to
- Click on the **Edit payment item** icon
- Go to the **Finance and accounting** section

- **Currently credits payments to**: confirmation of the existing bank account that funds for this payment item are settled to.
- **Credit to different bank account**: use the drop down to select the 'new' bank account that funds collected for this payment item should be settled to in the future.
- **Use different bank account from**: choose the date (in the future) that payments will start being settled to the 'new' bank account – remember, funds are settled via our collection service twice monthly (1-15 and 16-end of each month), you may wish to choose to settle funds to the new account after the current settlement period or with immediate effect the following day.

ParentPay Communication Centre™

Overview and settings: before you get started

Choose the right settings for your school

If you are planning to use ParentPay Communication Centre™ to send emails and/or SMS messages, you can define the settings that will tell ParentPay what types of email addresses/mobile phone numbers you wish to use.

Please note that ParentPay has currently defaulted your settings to only allow you to send to verified emails/mobiles as we can ensure that any messages you send will go to the intended parent and not someone else, ensuring that information pertaining to pupil's is not sent to the wrong recipient.

To check or amend your settings go to **Communication>Settings**

Verified email addresses – entered and verified in ParentPay by the parent
Verified mobile numbers – entered and verified in ParentPay by the parent
Unverified email addresses – entered in ParentPay but NOT verified by the parent
Unverified mobile numbers – entered in ParentPay but NOT verified by the parent
MIS email contacts - email addresses imported to ParentPay from your MIS system. *NB these are not classed as verified.*
MIS mobile contacts – mobile numbers imported to ParentPay from your MIS system. *NB these are not classed as verified.*
Send only to Priority 1 contacts – if you have imported data from section 5 in SIMS you need to ensure that only the priority 1 contact information is used
You can also set your system to allow or not allow parents to set automated email/text alerts using their Alerts options.

In addition, you can choose to subsidise SMS alerts set by parents i.e. you have a low income family that is not entitled to FSM and you would like to pay the price of them receiving a low dinner money balance SMS alert from the system so they know it is time to top up their child's account.

Understanding the message priority settings

ParentPay has currently pre-defined the settings for communication deemed as **Normal** and **Urgent.** These can be viewed under **Communication>Contacts** and select **Default Rules** in **Choose View**

You also need to be aware that parents can select which channel/s they prefer you to use for each priority, which is why the **Payer communication preference** is the first option in the **Channels in use list** for each priority default rule – you are able to override this if you wish by simply clicking on it using the **<< button** to move it to the **Unused channels** list.

Understanding your message creation

The ParentPay Communication Centre™ works in a logical fashion and creates whatever type of message or combination of channels you need: letter and/or, email and/or SMS or all three together in six easy steps.

1. **Select starting point**
   Use or adapt a previous message by clicking **Communication>>Send Message** or start again with a new template by clicking **Communication>>Create Letter**
2. **Write message**
   Choose the channel (channel = method of sending, i.e. Letter, Email or SMS, see tick boxes on letter) Create a new message or edit an existing message or template, upload your signature etc
3. **Message options**
   Set urgency & sending preferences, add attachments (email only)
4. **Choose recipients**
   Select various combinations to create your recipient list: year group, reg group, custom group, single family, debtors etc
5. **Confirm Send**
   An opportunity to tell the system to display a pdf (ONLY AVAILABLE FOR THE LETTER CHANNEL) to the parent in their online account and double check your message selections and settings before sending
6. **Message run summary**
   Email & SMS messages will have been sent/queued for sending, now is the time to print your letters, elect to Show/hide the pdf in parent accounts and view reports (ONLY AVAILABLE FOR THE LETTER CHANNEL)

Before you create your messages you will need to consider what channel/s you want to send your messages via. There are lots of pre-defined templates we have put together for you, all of your old templates that you created using our old mail merge facility are still available to you also.

Generating letters, emails and SMS messages

Go to **Communication>Send message**

Display old messages and templates: you can use the drop down menu in the column header to select a template, select a template listed on screen or click Show more to expand the list
Subject: select your message template according to subject
Owner: you can use templates you have created or those others have created by using the drop down menu in this column to select the Owner (creator)
Date created: locate a recent/historical message template that you would like to clone
Last cloned: ensure you are using the most recent version of a template
Num times cloned: see how many times it has been used before
Channels: Email, SMS and letter channels are represented by icons, whatever icons you see in this column represent the channels available for that particular template – you can use the drop down menu in the column header to elect to see only templates that apply to a particular channel:

Email

SMS text message

Printed letter

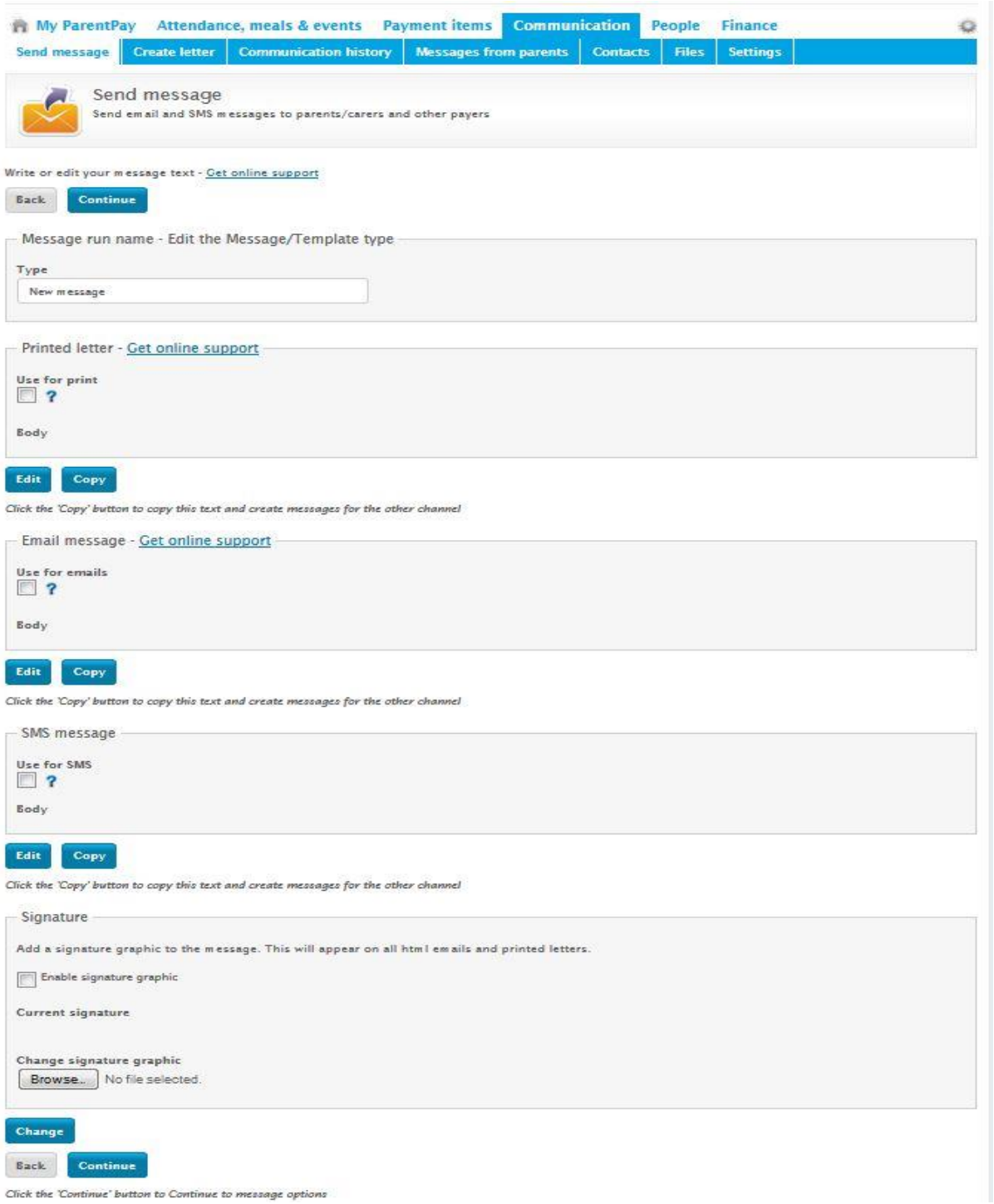
Actions: click Clone to create/edit the template you have chosen
Once you have established the channel you would like to use and chosen your template to clone you are ready to edit/create your message.

Creating/editing message templates

Once you have chosen your template and clicked to clone it you need to create/edit the text for your message and channels chosen, upload your signature etc.

Give your message a message run name

This is the **Message/template type** name that appears in the template list screen.



Selecting the appropriate channels to send your message

If you are using an existing cloned template the associated channels will already be ticked and you will see a preview of the message text on screen. If you are creating a new message template you will need to tick the channels you wish to use and click **Edit**.

NB: Comprehensive lists of the mail merge fields you will need are available from our support site. All mail merge field codes must be prefixed by<and end with/> so the text editor knows it is a merge field not plain text.

Hints & tips

To insert a mail merge field/signature graphic in your message body, highlight the mail merge parameter you wish to use such as <signature/> in the List of field codes on the right of the screen, left click your mouse and simply drag and drop the field into the appropriate place!

When uploading your signature file please ensure it is not in a word document, it must be an image file (.jpg, .tiff or similar).

Hints & tips

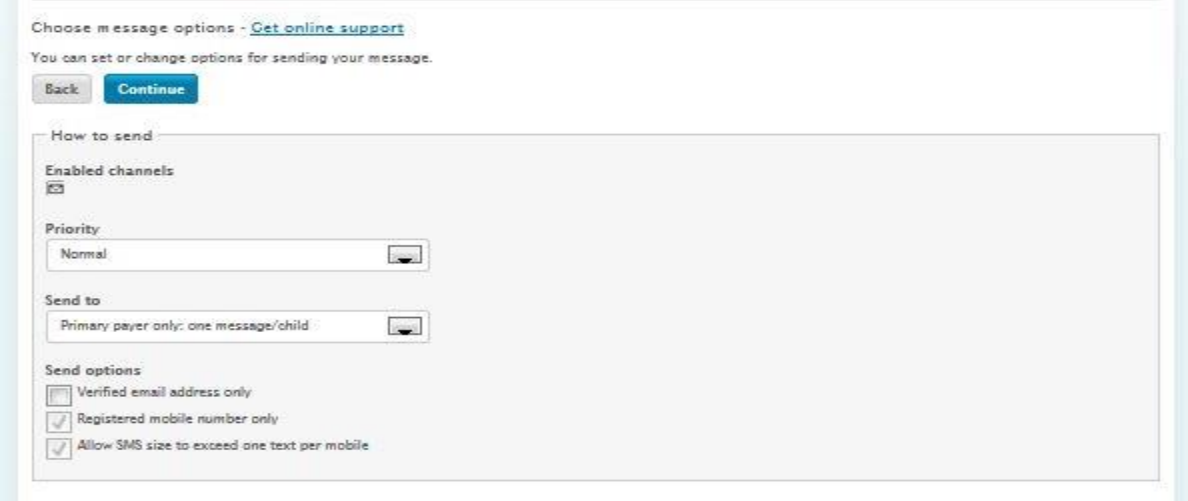
If you are sending your message using a combination of channels, there is no need to edit each one individually. Simply click Copy in the preview area of the channel you have created/edited the template for and the text you have created will be copied into the remaining two channels – great when you need to send a message via letter and email, just remember if you do copy text to the other channels, un-tick the channel you do not want to use such as SMS!

IMPORTANT: Your template text will not be saved until you have completed your message run, if you cancel out of the process now any changes you have made to the template will be lost!

Now you are ready to select your message options.

Message options

This screen allows you to select the **Priority** of your message using the pre-defined settings in **Communication>Manage contacts>Default rules**



If you are sending an email, this screen is where you will type in the subject of your email and add attachments – attachments must not exceed 1Mb each and can be of any file type: Excel, Word, and Pdf etc

NB: you can add attachments when using ONLY the email channel. If you elect to send a letter and email or email and SMS you will be unable to use attachments.

Choose recipients

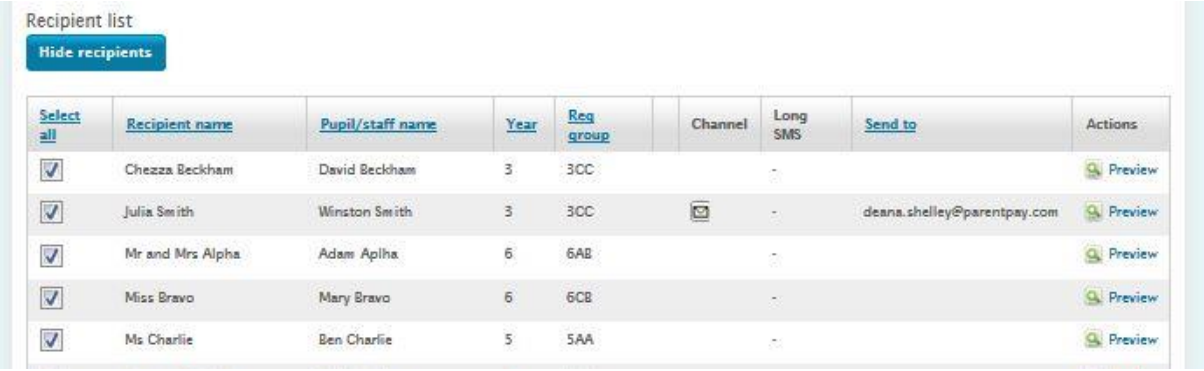
This is the really clever part of the ParentPay Communication Centre™! You can select various recipient groups to drill down to the end recipient list.

For example: you want to send an email and SMS message to dinner money debtors – you select the **All pupils** group and **Add** them, then select **Service - Account balance BELOW value**, then select the payment item you need to identify the debtors from **Dinner money** and type in the **value amount** such as £1.50 or -£1.50 then **Add** that group – ParentPay will drill down to all those pupils who have a dinner money balance of less than £1.50 or -£1.50 according to your selections!

The **TOTAL** field will show you the total number of debtors from your selection/s, this number and a breakdown of recipients by communication channel is visible in the **Pick recipient – summary** section at the top of the screen.

The **Pick recipient – summary** section also tells you if the SMS message you have chosen to send exceeds one SMS message size, enabling you to manage costs quickly and effectively

If you want to view the recipients, their balance and the channel to be used click **Show (bottom of screen)**, the full list of recipients from your selections will appear on screen.



Hints & tips

Click Show to check the individual recipients – you can preview the message to be sent by clicking on the 1st icon in the Actions column and remove any individuals by un-ticking the tick box on the right. NB: the preview will not show signatures or barcodes!

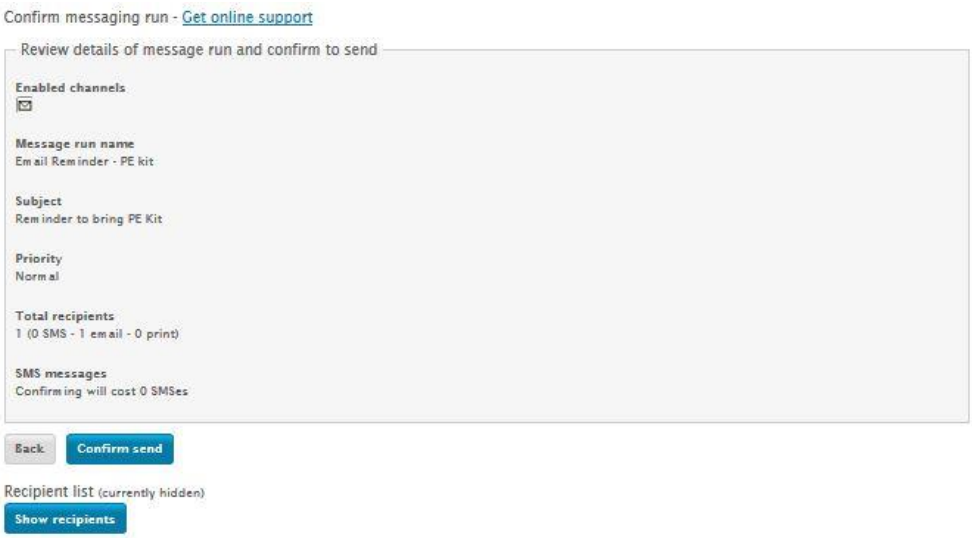
The **Potential delivery problems** field in the **Pick recipients – summary** section will tell you how many of your recipients have **No suitable contact details**. If this happens continue with your message run and on the **Message run summary** screen at the end of the process click to **View recipient exception report** so you can identify the individuals and create a new message for them from your template.

Once you have finished selecting your recipients it is time to review the options you have selected, click **Continue**!

Confirm send

A final breakdown of your message run will appear on screen showing: the channel/s you have elected to send the message via, the priority of the message, total number of recipients with a breakdown of each channel type and the total number of chargeable SMS messages you are sending.

Letter available via Parent/Carer login: you will also be given the option to display a pdf of the letter to parents in their online account (ONLY AVAILABLE FOR THE LETTER CHANNEL).



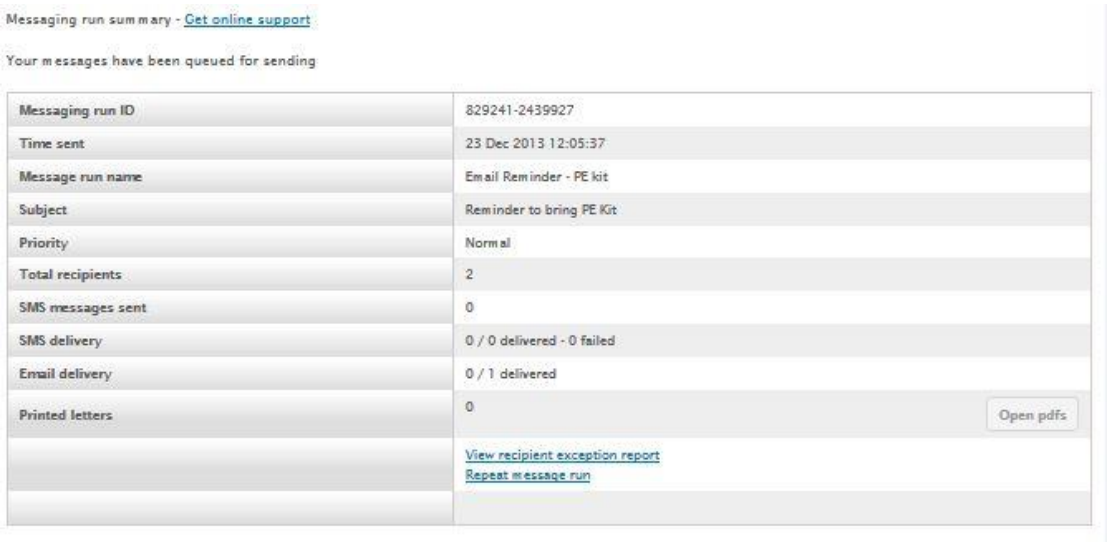
Message run summary

The message run summary screen will show you how many messages have been sent/delivered/failed. The breakdown of SMS and email messages you will see is as follows:

Email delivery: 0/16 delivered – this indicates that all 16 messages were sent successfully but have yet to be opened by the recipient (this feature is dependent on the type of mail provider your users are with such as yahoo, hotmail etc.) What a great way to tell if parents are reading your emails!

If you are sending a printed letter this is the point at which you will click to **Open pdfs** and print from the pdf.

Letter available via Parent/Carer login: you will also be given the option to 'Show/hide' a pdf of the letter to parents in their online account (ONLY AVAILABLE FOR THE LETTER CHANNEL).


Messaging run summary - Get online support
Your messages have been queued for sending
Messaging run ID 829241-2439927
Time sent 23 Dec 2013 12:05:37
Message run name Email Reminder - PE kit
Subject Reminder to bring PE Kit
Priority Normal
Total recipients 2
SMS messages sent 0
SMS delivery 0 / 0 delivered - 0 failed
Email delivery 0 / 1 delivered
Printed letters 0
Open pdfs
View recipient exception report
Repeat message run

You can revisit this summary at any time via **Communication>Communication history**

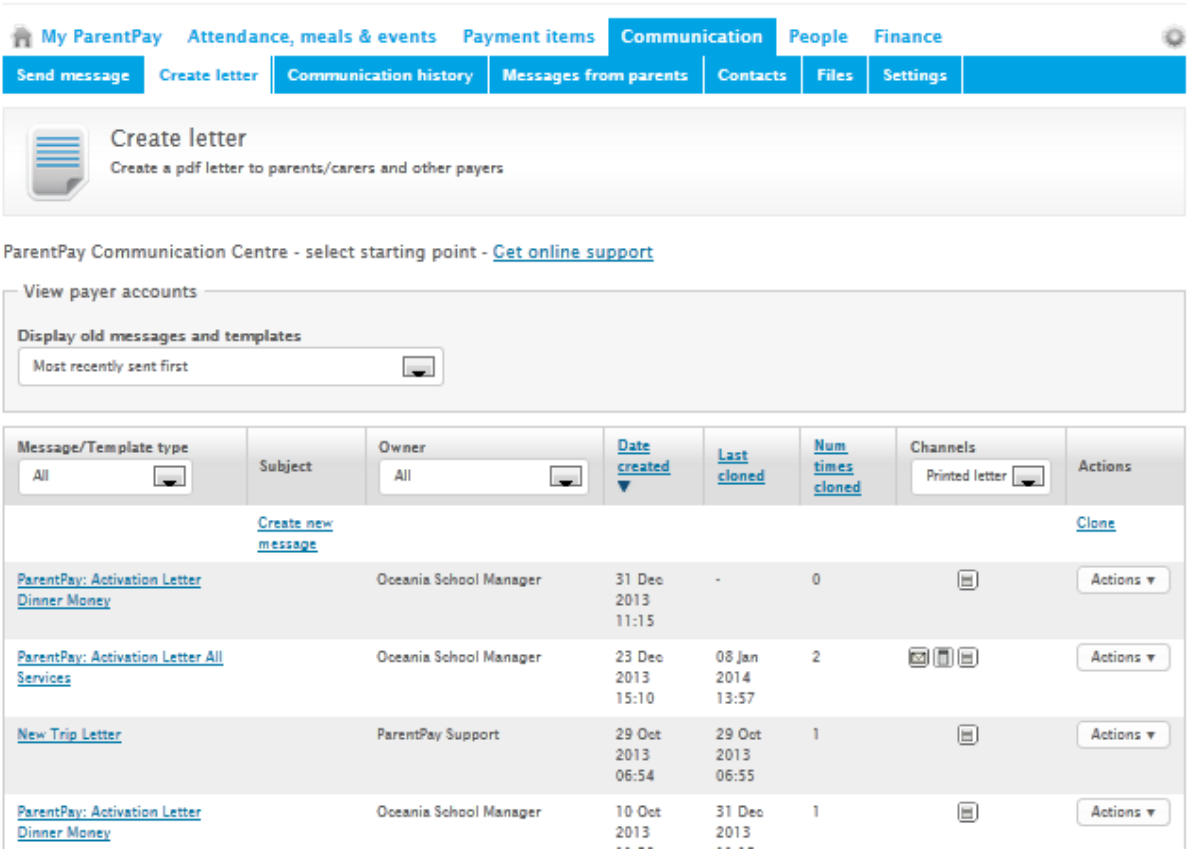
Activation letters

Click on the **Communication tab**

Choose your template

Select the letter template you would like to use, for the purposes of this guide we can choose: ParentPay – Activation letter all services or ParentPay – Activation letter school meals only.

All your old templates are still available to you and can be found using the drop down menus in the columns headed Message/Template type and Owner.

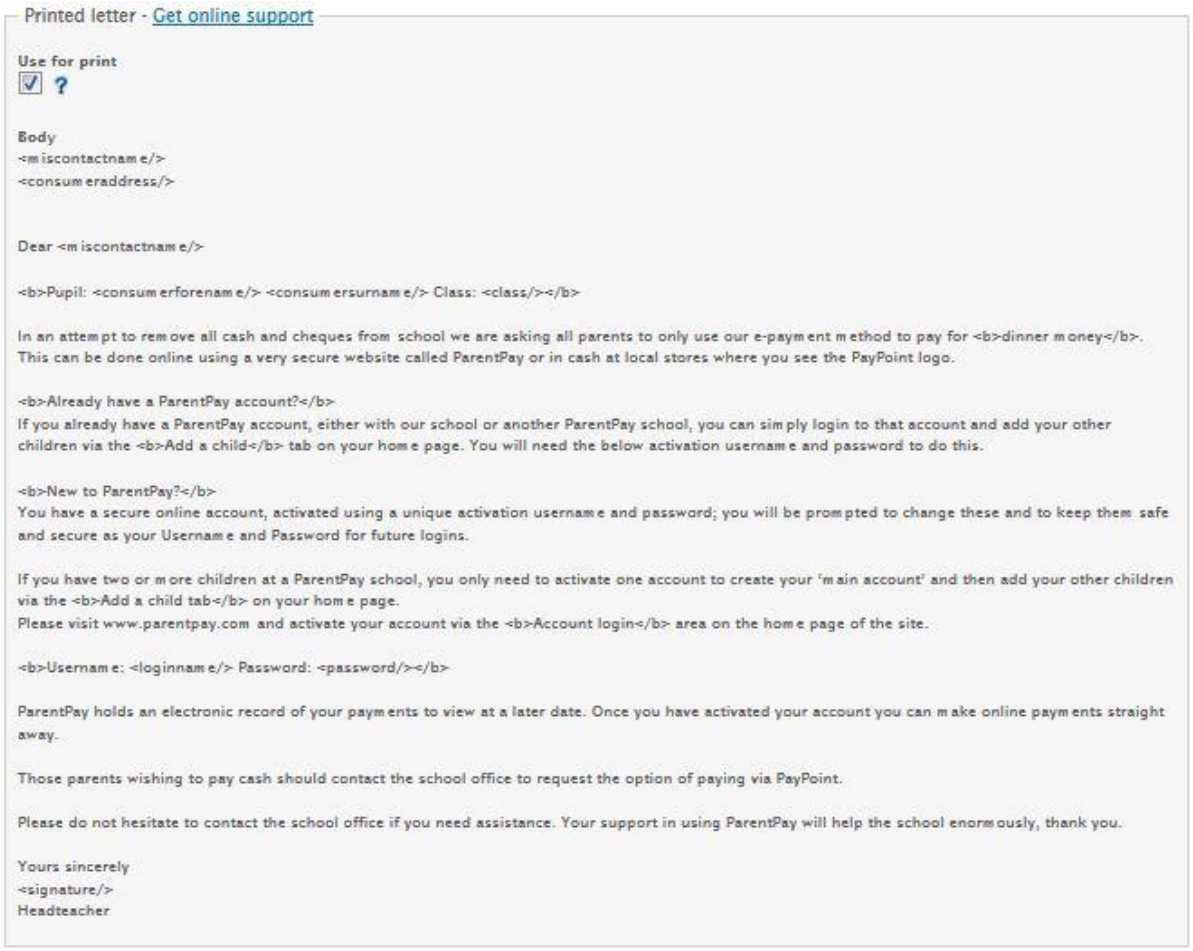


Click on the **Title** of the template in the **Message/Template type column** or click on the **Clone icon** in the **Actions** column.

Edit your template

You will see a preview of the letter on screen with the **Use for print** and **Use for email** tick boxes ticked. If you are using one of your historical templates only the Use for print tick box will be ticked.

If you only want to send a printed letter, simply un-tick the Use for email tick box. Click **Edit** to make any changes you require and remember to **Save** any changes you make in the text editor.


Printed letter - Get online support
Use for print
Body
<miscontactname/>
<consumeraddress/>
Dear <miscontactname/>
Pupil: <consumerforename/> <consumersurname/> Class: <class/>
In an attempt to remove all cash and cheques from school we are asking all parents to only use our e-payment method to pay for dinner money.
This can be done online using a very secure website called ParentPay or in cash at local stores where you see the PayPoint logo.
Already have a ParentPay account?
If you already have a ParentPay account, either with our school or another ParentPay school, you can simply login to that account and add your other children via the Add a child tab on your home page. You will need the below activation username and password to do this.
New to ParentPay?
You have a secure online account, activated using a unique activation username and password; you will be prompted to change these and to keep them safe and secure as your Username and Password for future logins.
If you have two or more children at a ParentPay school, you only need to activate one account to create your 'main account' and then add your other children via the Add a child tab on your home page.
Please visit www.parentpay.com and activate your account via the Account login area on the home page of the site.
Username: <loginname/> Password: <password/>
ParentPay holds an electronic record of your payments to view at a later date. Once you have activated your account you can make online payments straight away.
Those parents wishing to pay cash should contact the school office to request the option of paying via PayPoint.
Please do not hesitate to contact the school office if you need assistance. Your support in using ParentPay will help the school enormously, thank you.
Yours sincerely
<signature/>
Headteacher

Hints & tips

If you would like to add a mail merge field/signature graphic you can do so as follows: highlight the merge field code that you want to use in the Field code list <signature/> left click on your mouse constantly and simply drag and drop it into the text editor where you would like the merged information to appear in your message.

Click **Browse** to locate your signature

Click **Change** to upload it to your template

Your signature will appear on screen for you to preview

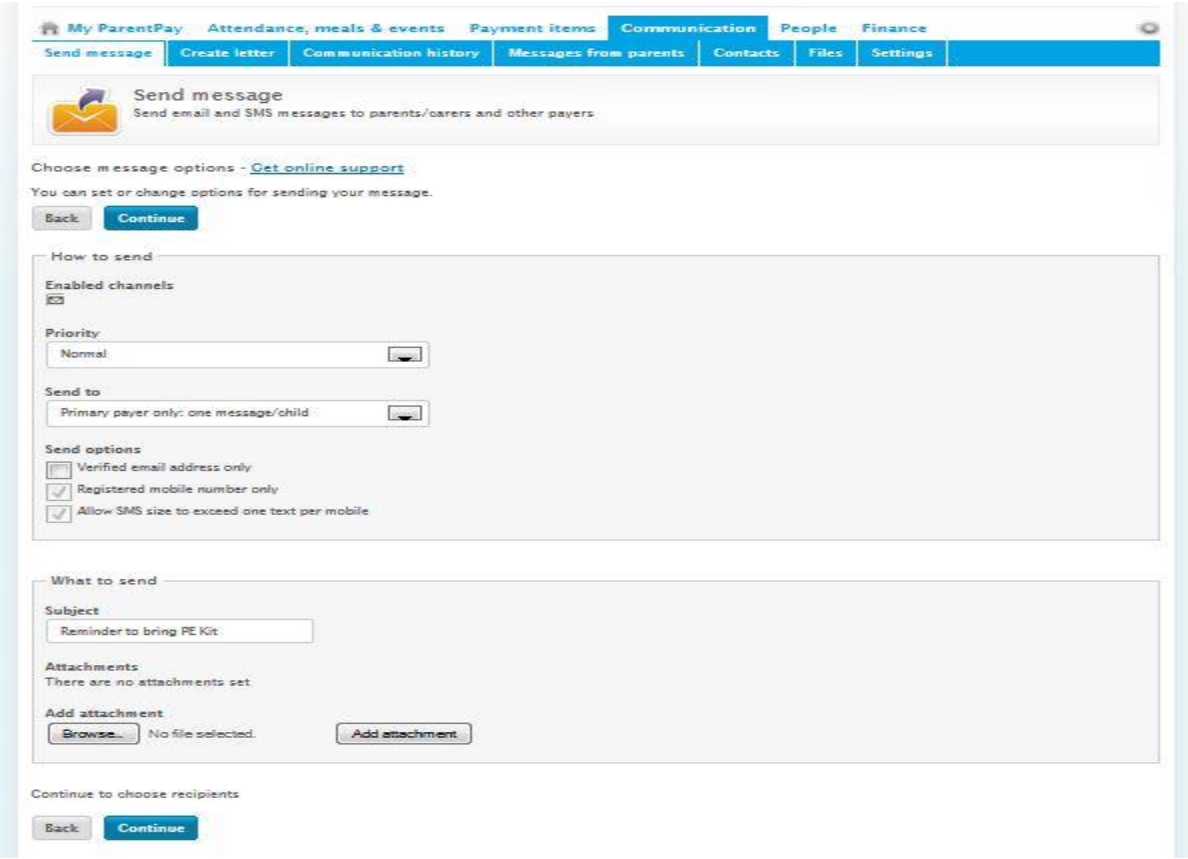
Signature
Add a signature graphic to the message. This will appear on all html emails and printed letters.
Enable signature graphic
Current signature
George Orwell
Change signature graphic
Browse...
No file selected.

Click **Continue**

Choose how/what to send

Choose the appropriate options for your letter: what is the priority, who do you want to send it to and how?

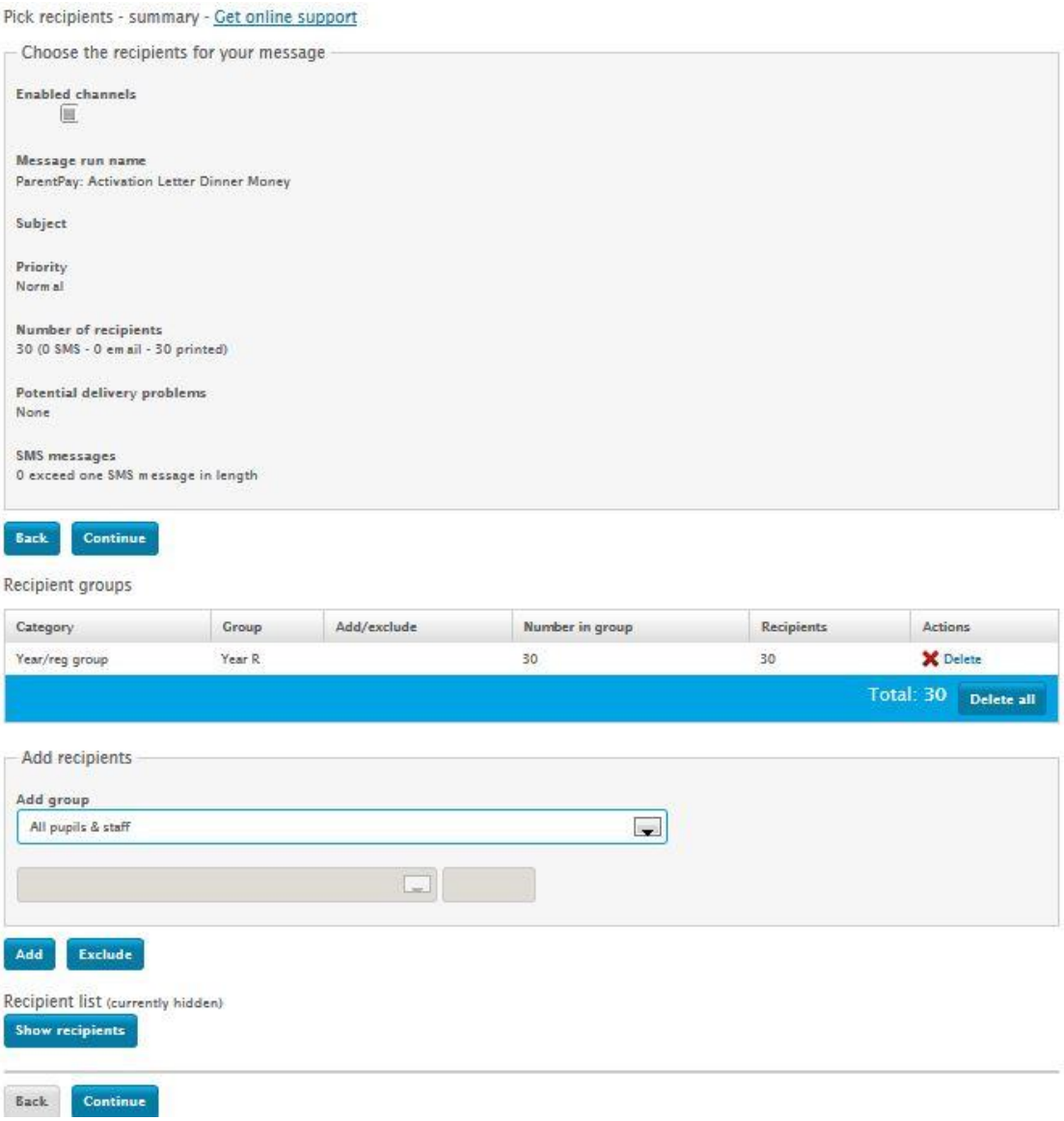
NB: for the purposes of an activation letter you must select Primary payer only: one message/child or Each payer when sending to a secondary payer for a child, in this instance you will need to use the field codes <consumerrepeater> and </consumerrepeater> before and after any area of text that contains information pertaining to the pupil such as name and class.



Click **Continue**

Choose your recipient group/s

In the Add recipients section use the drop down menu alongside Add group to select your recipients for the activation letters – individual year group, all pupils, all pupils and staff, individual pupil etc.



Click **Add**

Sending to individuals

Select **Individual pupil** from the drop down menu, the two fields below the Add group field will become active. Use the left hand field to select the class the pupil is in and use the right hand field to select the pupil's name, click **Add**

If sending to an individual staff member select Individual pupil from the drop down menu, the two fields below the Add group field will become active. Use the left hand field to select the staff group and use the right hand field to select the staff member's name, click **Add**

Hints & tips

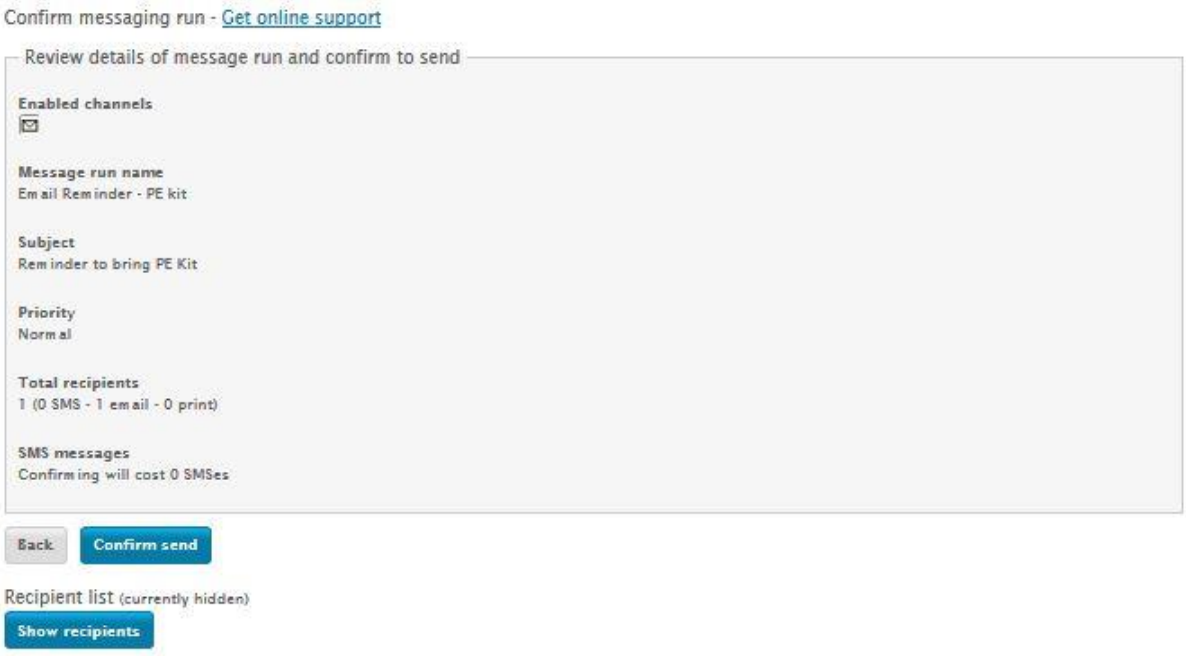
Click Show to check the individual recipients – you can preview the message to be sent by clicking on the 1st icon in the Actions column and remove any individuals by un-ticking the tick box on the right.

If, at any time, you want to change your selections you can do so using the BIN icon in the Actions column of the Recipient groups section or use the Delete all button to remove all previous selections.

Once you are happy that you have selected the correct recipients click **Continue**

Confirm send

A final breakdown of your message run will appear on screen showing: the channel/s you have elected to send the message via, the priority of the message, total number of recipients with a breakdown of each channel type and the total number of chargeable SMS messages you are sending where appropriate.



IMPORTANT: Do not tick the 'Letter available via Parent/Carer login' tick box, this is an 'activation' letter and therefore until parents/carers have received this letter they will be unable to view the letter in their online account.

Click **Confirm Send**

Print letters

Click **Open pdfs** to print your letters

Troubleshooting

❖ **Help, the mail merge is not bringing in the information!**
Check the following steps in this quick guide:

Step 1. Editing your template*:* does the body text contain all correct mail merge parameters?

Step 2. Choose how/what to send: have you selected Primary payer only: one message/child in the Send to section?

- **My pdf's are not rendering!**

Check the following steps in this quick guide:

Step 1. Editing your template*:* does the body text contain all correct mail merge parameters? Check that any bolded text starts with and ends with etc

- **My pdf's will not open!**

This is nearly always a local issue. Some schools do not have permission to download particular items from the internet, if you are given the option to save them please do so and then open and print them locally from your pc.

If you get an error message it is likely that a recent windows update has affected your settings in Internet explorer please visit our support site for guidance on how to resolve this issue.

If both the above are not the case, please contact your IT support as ParentPay will be unable to assist you further.

PayPoint barcode letters

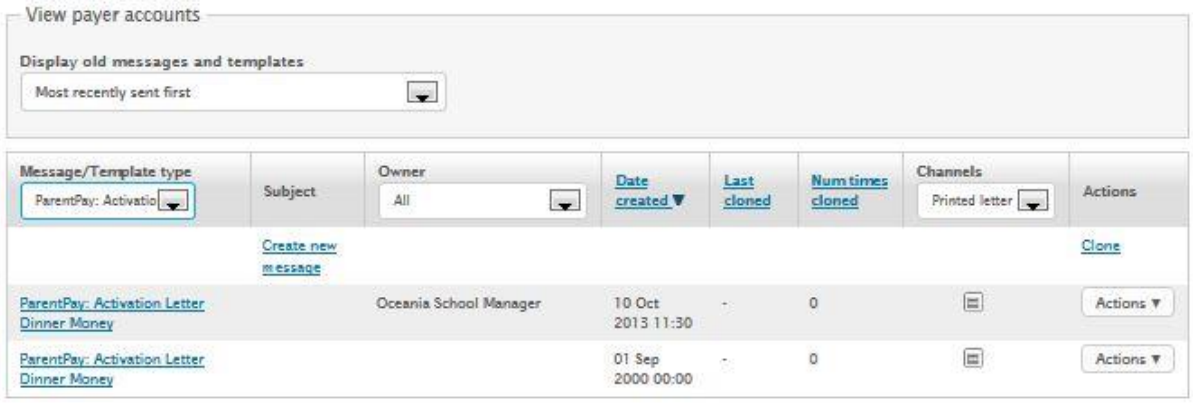
Before you start: Go to **Payment Items>View Payment Items** and, locate the payment item you want the barcode letter for. Select **Edit Payment Item** from the drop down options and check the **PayPoint Barcode Enabled** box is ticked!

Click on the **Communication** tab

Choose your template

Hints & tips

There are pre-defined templates available to you that have a pre-defined channel associated with them, check the Channels column – the icons you see there will indicate if the template you are selecting is designed for Print, email, SMS or a combination of the three. PayPoint barcodes are only available to the printed letter channel



All your old templates are still available to you and can be found using the drop down menus in the columns headed Message/Template type and Owner.

Click on the **Title** of the template in the **Message/Template type column** or click on the **Clone icon** in the **Actions** column

Edit your letter template

The letter channel will be ticked and you will see a preview of the template text on screen. Click **Edit** to go into the editor and make any changes you would like to make.

NB: make sure you have the <paypointbarcode/> mail merge parameter at the bottom of the letter template.

Remember to **Save** the message you have edited in the text editor

Uploading a signature

Tick the box alongside **Enable signature graphic**

Click **Browse** to locate your signature

Click **Change** to upload it to your template

Signature
Add a signature graphic to the message. This will appear on all html emails and printed letters.
Enable signature graphic
Current signature
George Orwell
Change signature graphic
Browse...
No file selected.

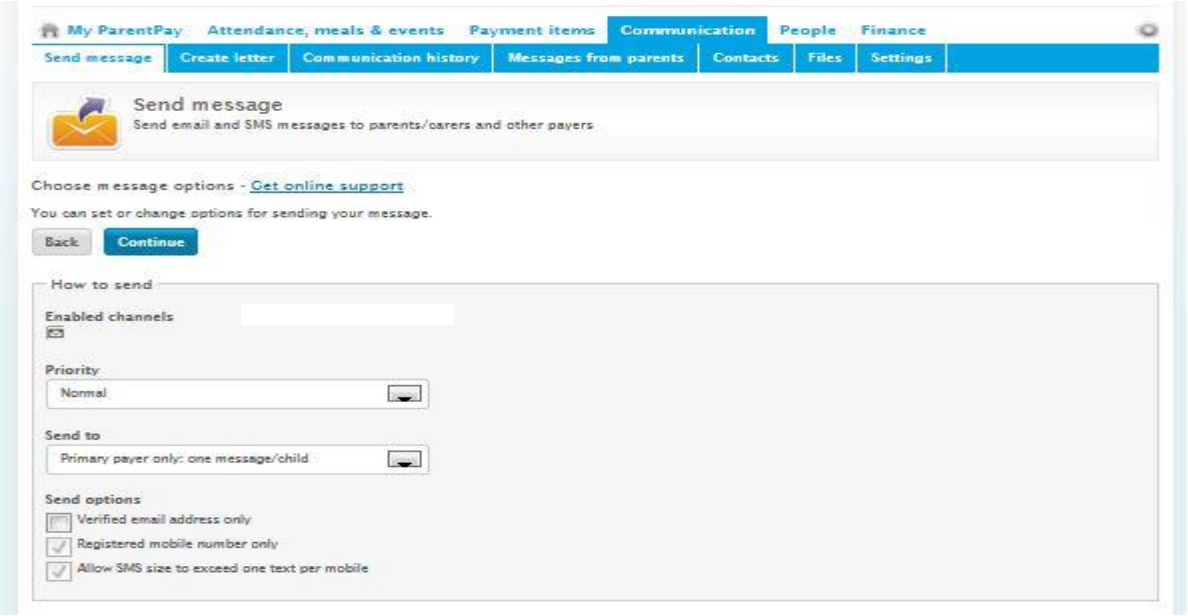
Your signature will appear on screen for you to preview

Click **Continue**

Choose how/what to send

Choose the appropriate options for your letter: what is the priority, who do you want to send it to and how?

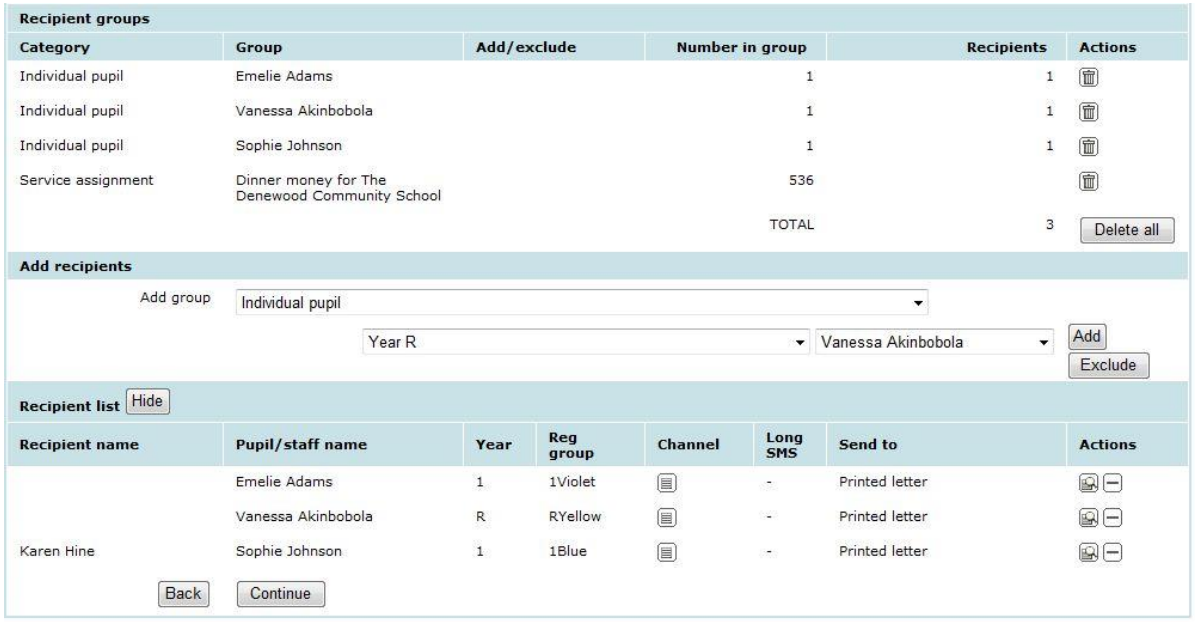
NB: for the purposes of a barcode letter you must select Primary payer only: one message/child or Each payer when sending to a secondary payer for a child



Click **Continue**

Choose your recipient group(s)

This is the really clever part of the ParentPay Communication Centre™! You can select various recipient groups to drill down to the end recipient list. In the **Add recipients** section, use the drop down menu alongside **Add group** to select your recipients for your message: All pupils, All pupils & staff, year group, class, individual pupil etc

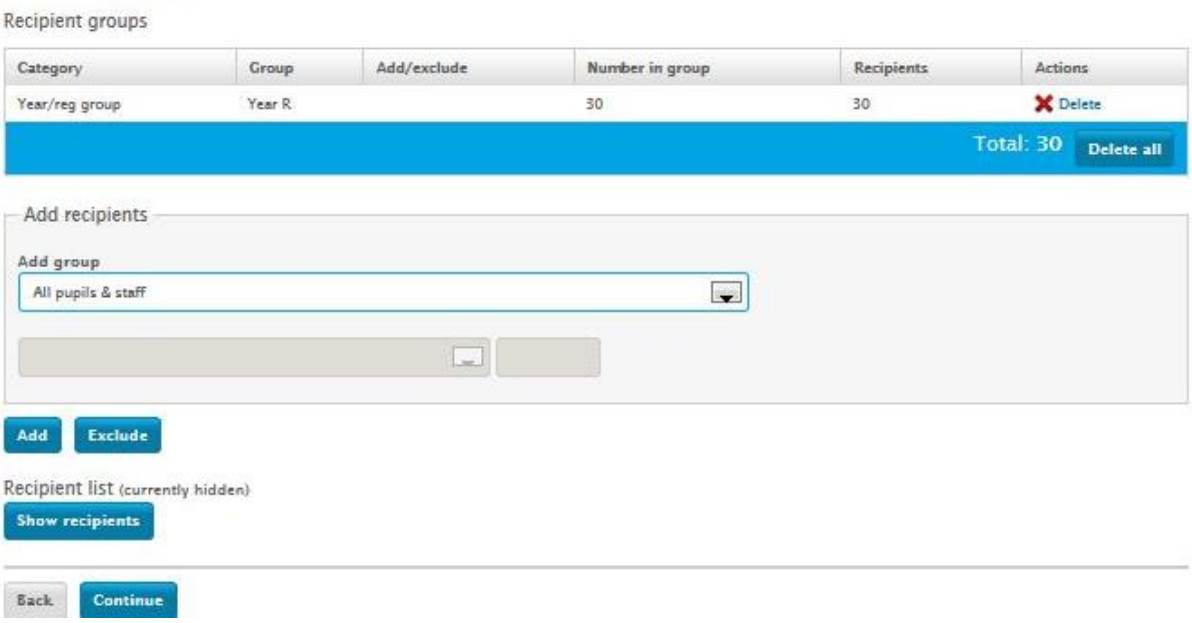


NB: you must select a payment item that the pupils are assigned to in order to generate a barcode letter for the pupil and associated payment item- if you do not select the payment item no barcode will be generated and your pdf's will not render.

Example: you want to send a barcode letter to pupils from a particular year group that are assigned to the dinner money payment item and also to a couple of individual pupils in other year groups/classes.

1. Select the payment item the barcode is to be associated with - use the drop down menu alongside **Add group** in the **Add recipients section** to select **Service – All assigned**, in the field below use the drop down menu to select your dinner money payment item and click **Add**.
2. You can then select your individual recipients/groups. Use the drop down menu alongside **Add group** in the **Add recipients section** to select a **Year group/class** and click **Add**. To select individuals to send the barcode letter to use the drop down menu alongside the **Add group** field in the **Add recipients** section and select **Individual pupil, use the fields below to select the class and then select the child** click **Add** – ParentPay will drill down to all those pupils that are part of your selection/s who are assigned to the dinner money payment item! (See above screenshot for selections).

Remember to click **Add** after each selection to put them in your recipient group above!



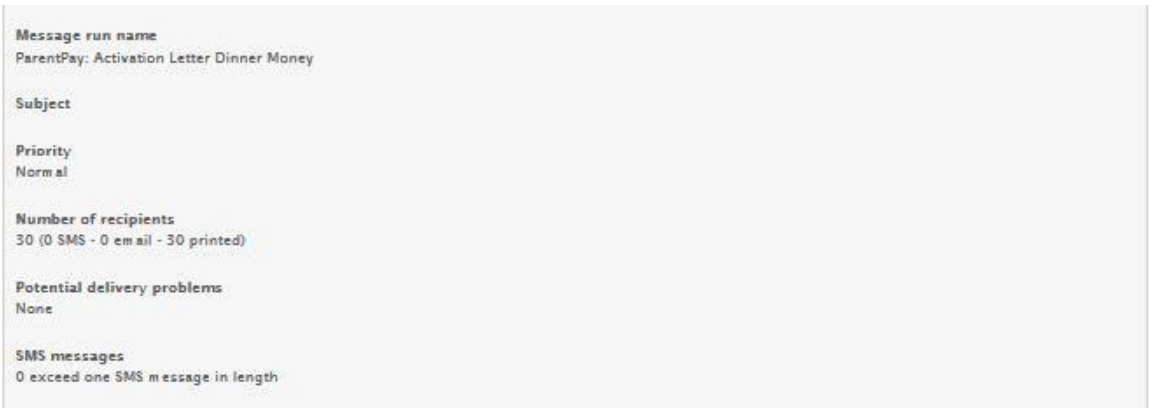
If, at any time, you want to change your selections you can do so using the BIN icon in the Actions column of the Recipient groups section or use the Delete all button to remove all previous selections.

Hints & tips

Click Show to check the individual recipients – you can preview the message to be sent by clicking on the 1st icon in the Actions column and remove any individuals by un-ticking the tick box on the right.

NB: the preview will not show the barcode only the pdf will show this once you confirm the sending of your message.

The **Pick recipients – summary** section at the top of the screen shows: the channel/s you have elected to send the message via, the priority of the message, total number of recipients with a breakdown of each channel type and the number SMS messages that exceed more than one message size. You will see for this template there are 60 printed letters in our group of recipients that we are able to send a letter to.

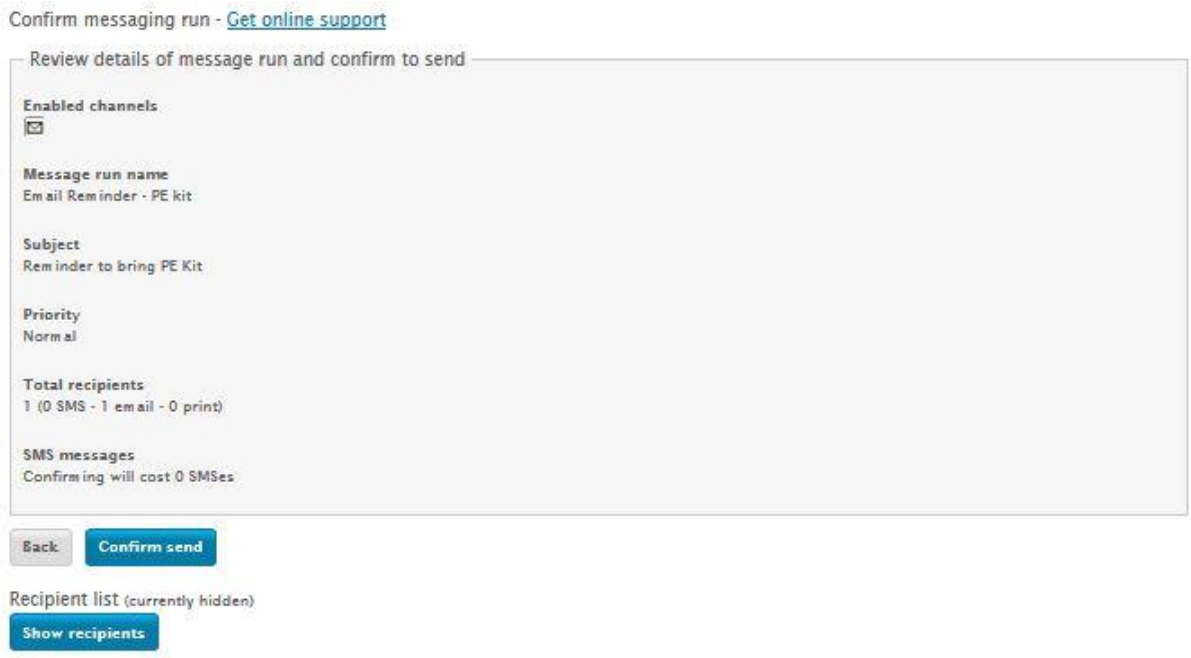


Once you are happy that you have selected the correct recipients click **Continue**

Confirm send

A final breakdown of your message run will appear on screen showing: the channel/s you have elected to send the message via, the priority of the message, total number of recipients with a breakdown of each channel type and the total number of chargeable SMS messages you are sending.

Letter available via Parent/Carer login: you will also be given the option to display a pdf of the letter to parents in their online account.



Message run summary

The message run summary screen will show you how many messages have been sent/delivered/failed. The breakdown of SMS and email messages you will see is as follows:

Email delivery: 0/16 delivered – this indicates that all 16 messages were sent successfully but have yet to be opened by the recipient (this feature is dependent on the type of mail provider your users are with such as yahoo, hotmail etc.) What a great way to tell if parents are reading your emails!

If you are sending a printed letter this is the point at which you will click to **Open pdfs** and print from the pdf.

Letter available via Parent/Carer login: you will also be given the option to 'Show/hide' a pdf of the letter to parents in their online account.

You can revisit this summary at any time via **Communication>History**

Troubleshooting

- **My letters have no barcodes!**

First, check that the child/children you need a letter for are assigned to the payment item you need the barcode for.

Second, check the following steps in this quick guide:

Step 1. Editing your template*:* the body text copied from a barcode template or your created text contains the field code <paypointbarcode/> at the end of the message.

Step 2. Choose how/what to send: have you selected Primary payer only: one message/child in the Send to section?

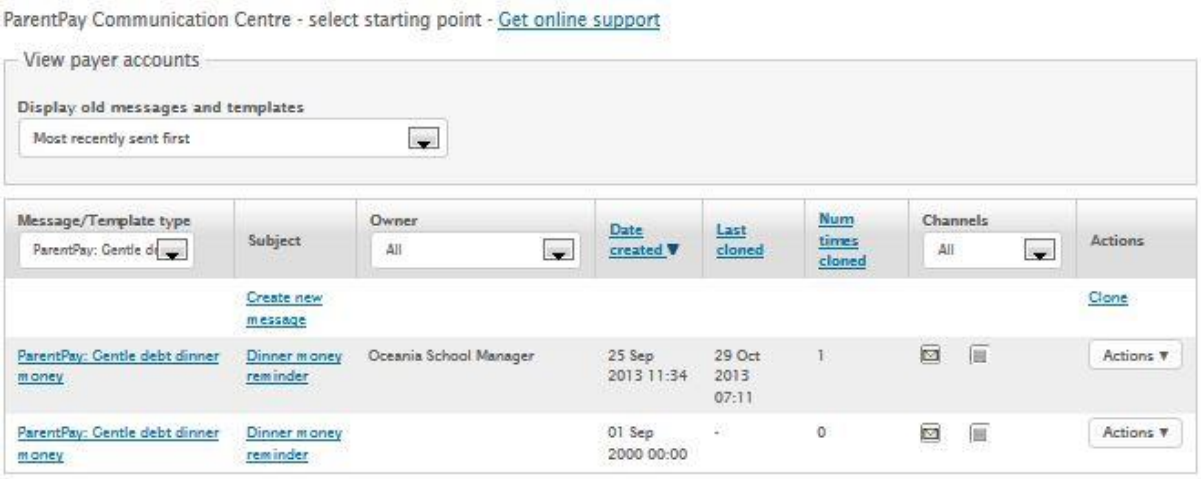
Step 3. Recipient groups*:* have you selected Service – All assigned?

Debt letters/emails/SMS

Click on the **Communication** tab

Choose your template

Select the letter template you would like to use



We are going to use the **ParentPay: Gentle debt dinner money** template for this example**.**

All your old templates are still available to you and can be found using the drop down menus in the columns headed Message/Template type and Owner.

Click on the **Title** of the template in the **Message/Template type column** or click on the **Clone icon** in the **Actions** column

Edit your template

You will see a preview of the letter on screen with the **Printed letter, Email and SMS** tick boxes ticked

Click **Edit** to make any changes you require or use the existing message text - remember to **Save** any changes you make in the text editor

If you need to send a barcode debt letter, please note that only the printed letter channel will produce a barcode as these are not supported in email/SMS messages. You will need to ensure you have the <paypointbarcode/> mail merge parameter at the bottom of your letter template.

Hints & tips

If you would like to add a mail merge field/signature graphic you can do so as follows: highlight the merge field code that you want to use in the Field code list <signature/> left click on your mouse constantly and simply drag and drop it into the text editor where you would like the merged information to appear in your message.

NB: be careful on the length of your SMS message – make sure you keep it brief so it only uses one SMS to send!

Uploading your signature

Tick the box alongside **Enable signature graphic**

Click **Browse** to locate your signature
Click **Change** to upload it to your template

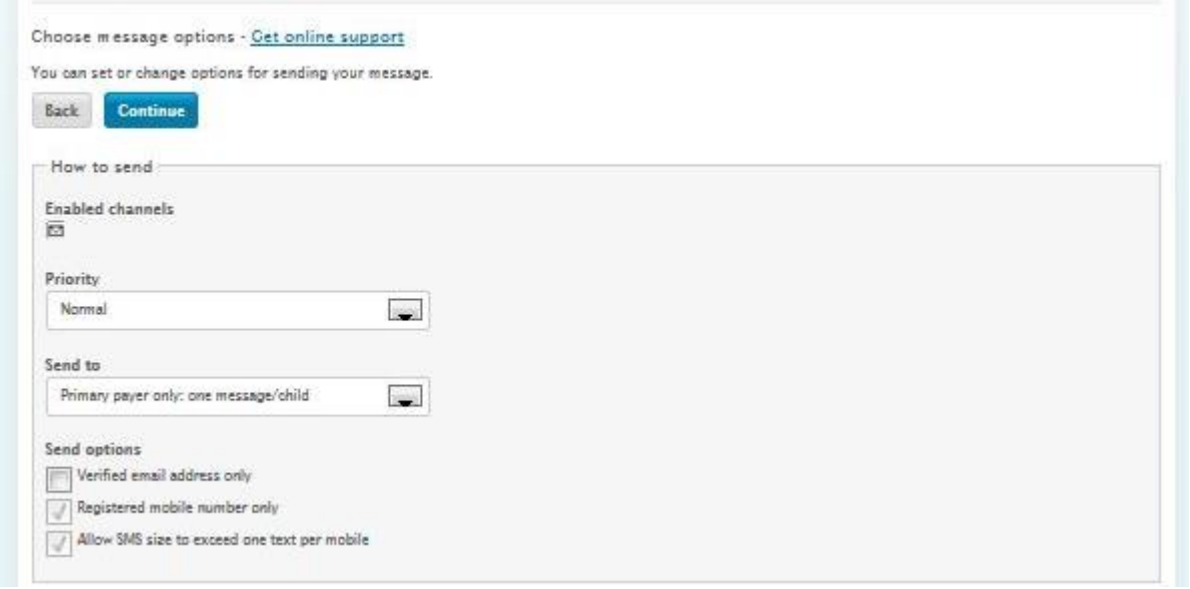
Your signature will appear on screen for you to preview

Signature
Add a signature graphic to the message. This will appear on all html emails and printed letters.
Enable signature graphic
Current signature
George Orwell
Change signature graphic
Browse...
No file selected.

Click **Continue**

Choose how/what to send

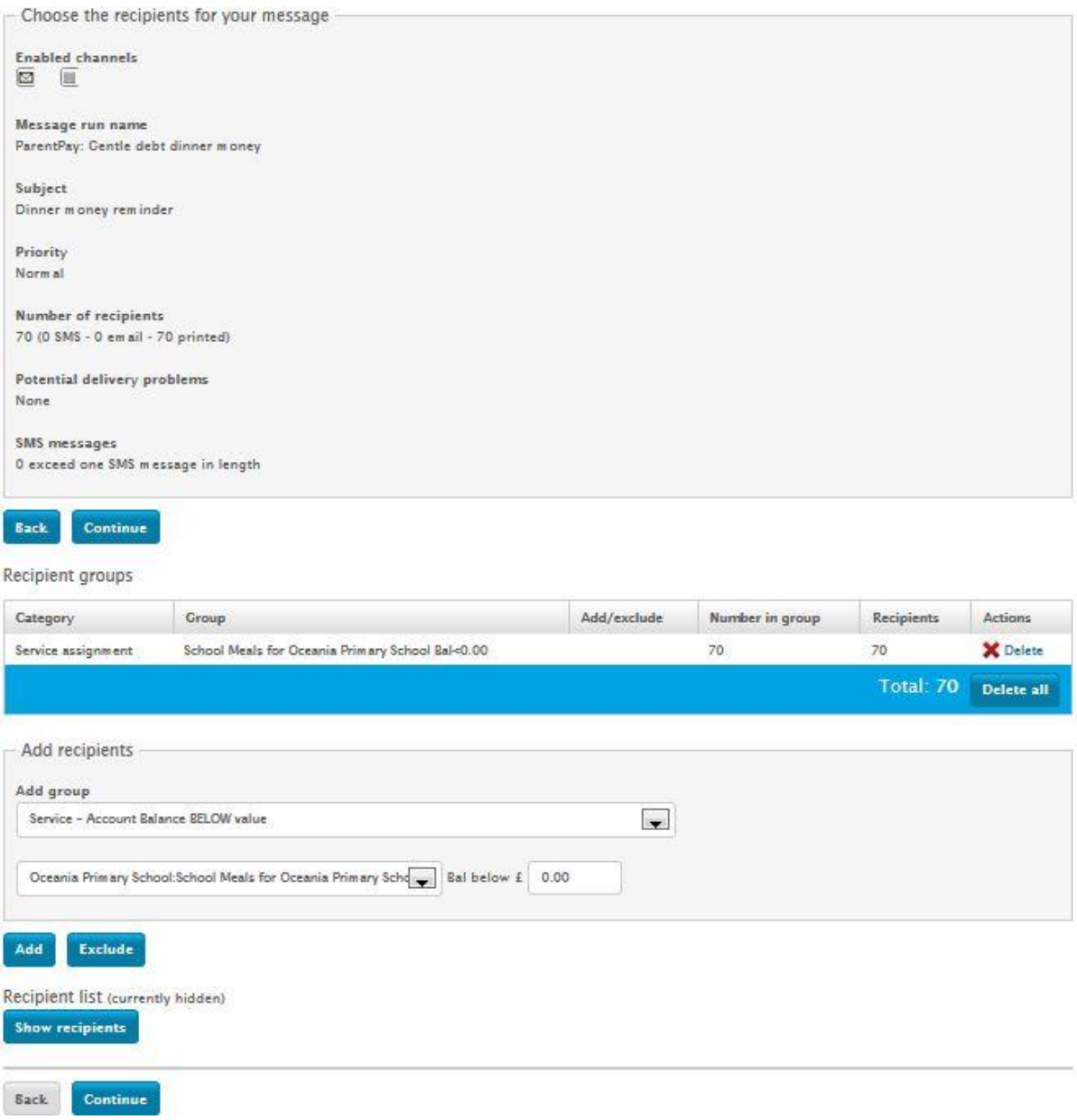
Choose the appropriate options for your message: what is the priority, who do you want to send it to and how? We recommend that you tick Verified email address only and Registered mobile number only as these have been recorded in ParentPay by the parent and we have verified that they are the recipient.



Click **Continue**

Choose your recipient group(s)

This is the really clever part of the ParentPay Communication Centre™! You can select various recipient groups to drill down to the end recipient list.



Example: you want to send a letter, email and SMS message to dinner money debtors.

In the Add recipients section use the drop down menu alongside Add group to select **Service – Account Balance BELOW value**, from the fields below select your **Dinner money** payment item and type in the **Bal below** such as £1.50 or -£5.00, click **Add -** ParentPay will drill down to all those pupils who have a dinner money balance of less than £1.50 or more than -£5.00 according to your selections!

Hints & tips

Click Show to check the individual recipients, their balance and so on – you can preview the message to be sent by clicking on the 1st icon in the Actions column and remove any individuals by un-ticking the tick box on the right.

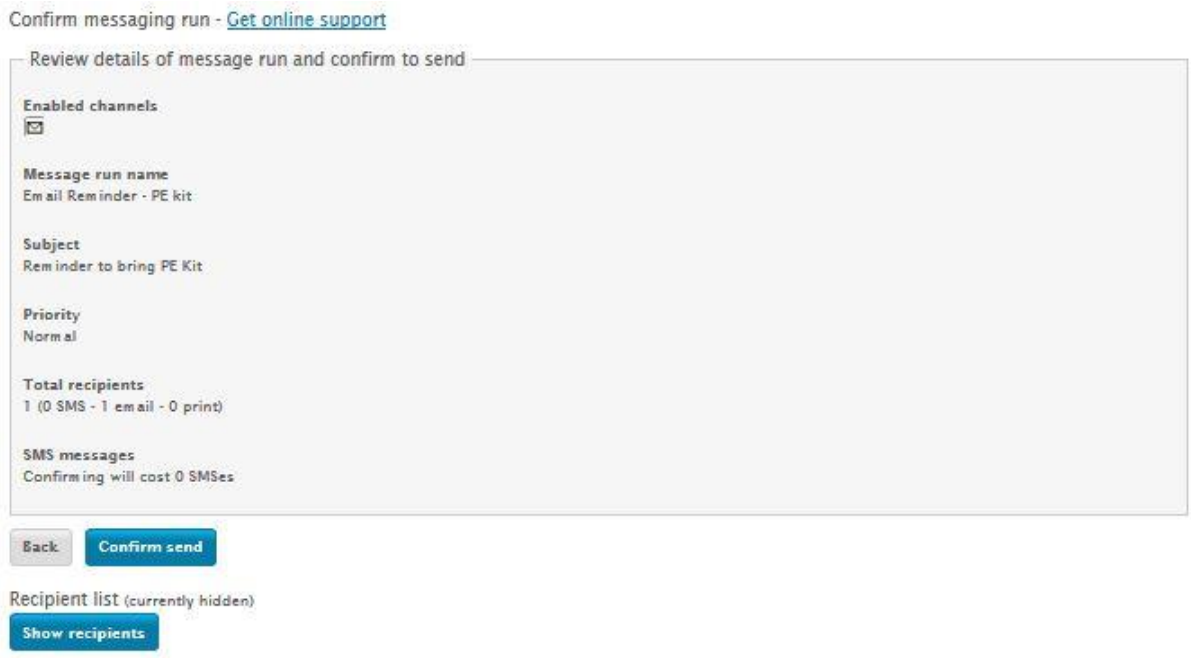
The **Pick recipient – summary** section tells you the total number of recipients and the type of channels to be used, if the SMS message you have chosen to send exceeds one SMS message size, enabling you to manage costs quickly and effectively!

Once you are happy that you have selected the correct recipients click **Continue**

Confirm send

A final breakdown of your message run will appear on screen showing: the channel/s you have elected to send the message via, the priority of the message, total number of recipients with a breakdown of each channel type and the total number of chargeable SMS messages you are sending.

Letter available via Parent/Carer login: you will also be given the option to display a pdf of the letter to parents in their online account.



Message run summary

The message run summary screen will show you how many messages have been sent/delivered/failed. The breakdown of SMS and email messages you will see is as follows:

Email delivery: 0/16 delivered – this indicates that all 16 messages were sent successfully but have yet to be opened by the recipient (this feature is dependent on the type of mail provider your users are with such as yahoo, hotmail etc.) What a great way to tell if parents are reading your emails!

If you are sending a printed letter this is the point at which you will click to **Open pdfs** and print from the pdf.

Letter available via Parent/Carer login: you will also be given the option to 'Show/hide' a pdf of the letter to parents in their online account (AVAILABLE FOR LETTER TEMPLATES ONLY).

You can revisit this summary at any time via **Communication>History**

Group SMS

Click on the **Communication** tab

Hints & tips

Click Show to check the individual recipients – you can preview the message to be sent by clicking on the 1st icon in the Actions column and remove any individuals by un-ticking the tick box on the right.

NB: the preview will not show the barcode only the pdf will show this once you confirm the sending of your message.

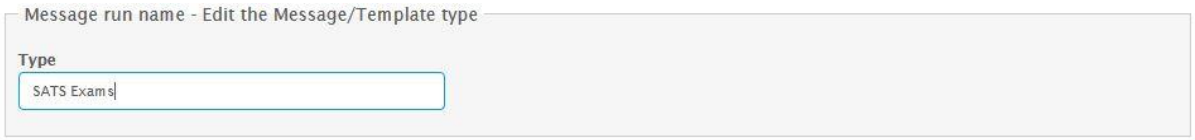
Select the **SMS template** you would like to use or click **Create new message** to create your own!

We are going to use the **Create new message** template for this example**.**

Click **Clone** in the **Actions** column alongside **Create new message**.

Edit your SMS template

First give your message run a name:



Tick the SMS tick box and click **Edit** to compose your message.

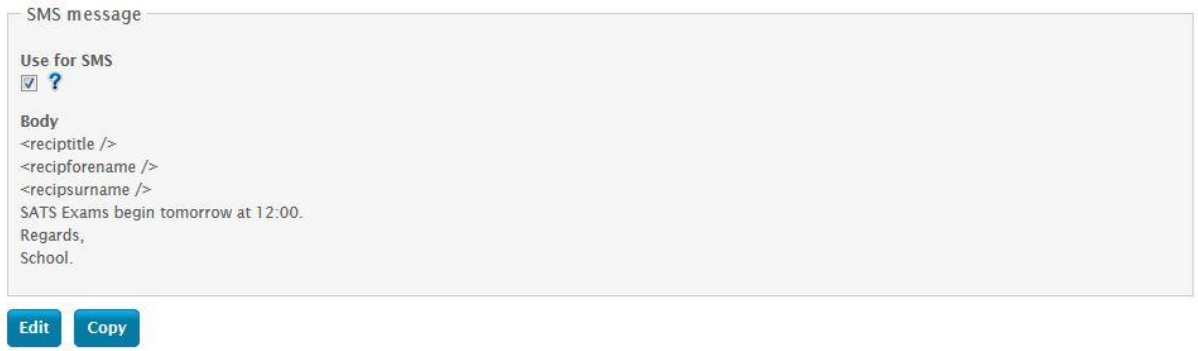
Hints & tips

Click Show to check the individual recipients – you can preview the message to be sent by clicking on the 1st icon in the Actions column and remove any individuals by un-ticking the tick box on the right.

NB: the preview will not show the barcode only the pdf will show this once you confirm the sending of your message.

Remember to **Save** the message you have created in the text editor.

A preview of your message will show on screen.

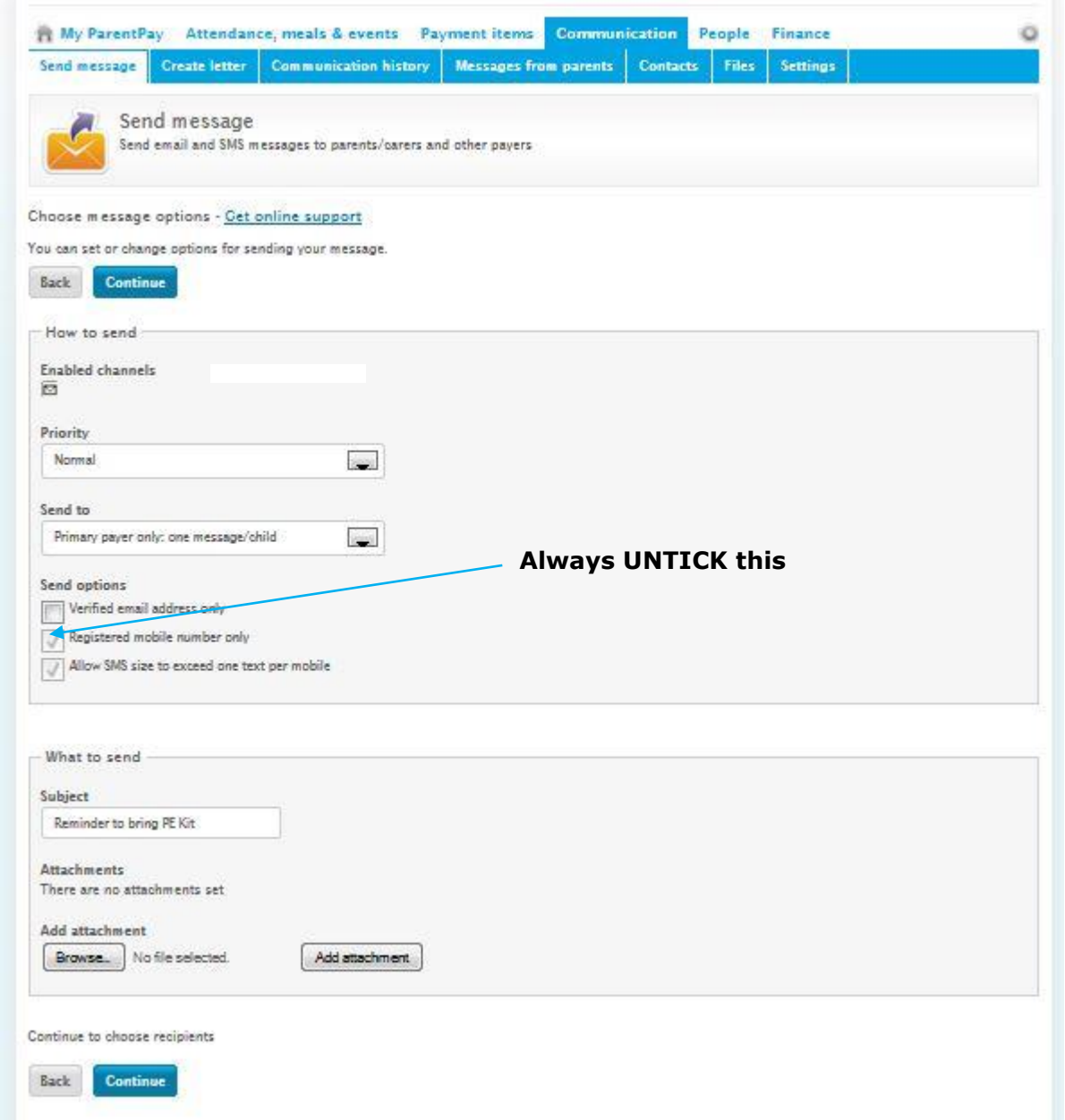


NB: be careful on the length of your SMS message – make sure you keep it brief so it only uses one SMS to send!

Click **Continue**

Choose how/what to send

Choose the appropriate options for your letter: what is the priority, who do you want to send it to and how?



NB. If you want to capture all users regardless of whether they have registered their mobile number, you need to **untick** the **Registered mobile number only** tick box.

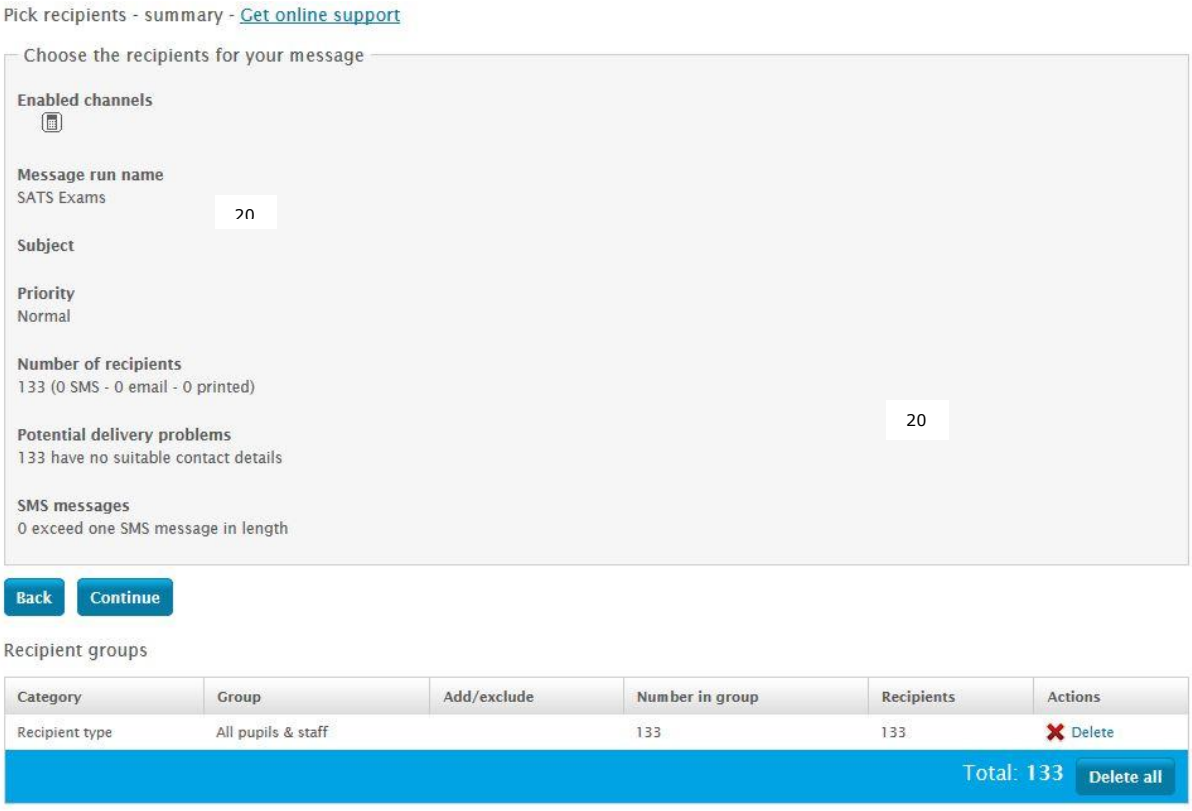
Click **Continue**

Choose your recipient group(s)

This is the really clever part of the ParentPay Communication Centre™! You can select various recipient groups to drill down to the end recipient list.
Example: you want to send a SMS message reminding parents that their child is taking an exam/test on a particular date/time – you can select the relevant year group i.e. Year 6 and **Add** them.

The **Number in group from list** column alongside the original group selected (in this case Year 6) will show you the total number SMS recipients according to your selection, this number and a breakdown of recipients by communication channel is visible in the **Pick recipient – summary** section at the top of the screen.

The **Pick recipient – summary** section also tells you if the SMS message you have chosen to send exceeds one SMS message size, enabling you to manage costs quickly and effectively!



Click **Add**

Hints & tips

Click Show to check the individual recipients – you can preview the message to be sent by clicking on the 1st icon in the Actions column and remove any individuals by un-ticking the tick box on the right.

The **Pick recipients – summary** section at the top of the screen shows: the channel/s you have elected to send the message via, the priority of the message, total number of recipients with a breakdown of each channel type and the number SMS messages that exceed more than one message size. You will see for this template there are 20 in our group of recipients that we are able to send a SMS to.

Once you are happy that you have selected the correct recipients click **Continue**

Confirm send

A final breakdown of your message run will appear on screen showing: the channel/s you have elected to send the message via, the priority of the message, total number of recipients with a breakdown of each channel type and the total number of chargeable SMS messages you are sending.

Click **Confirm Send:** A quick view report of your message run will appear on screen and your SMS messages will have been sent/queued for sending.

Payments

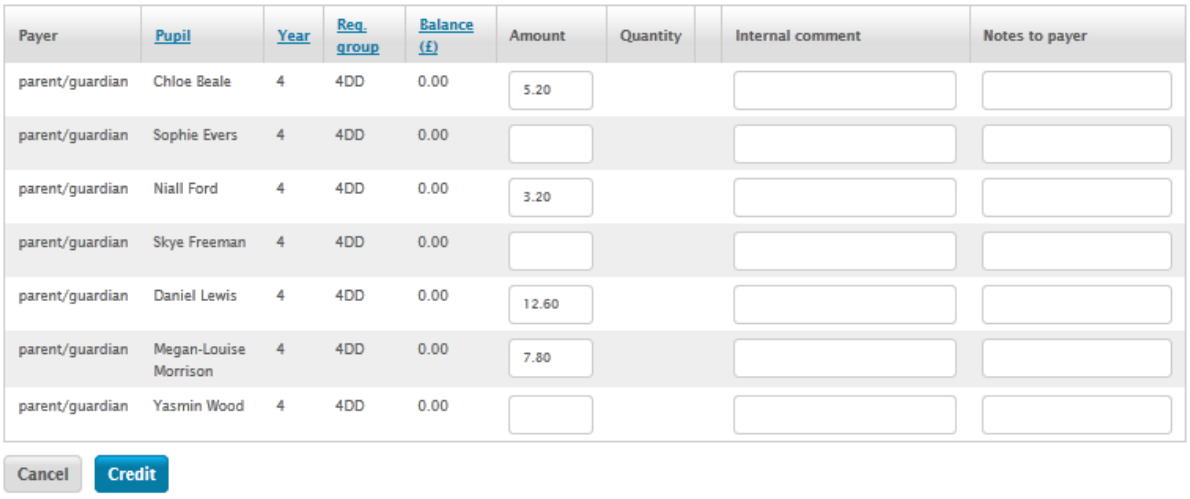
Recording opening balances

If you are just setting up ParentPay you may want to record opening balances for various payment items that you already have in school and will be migrating to ParentPay such as dinner money.

Go to **Finance>Record adjustments**

Using the drop down menus:

- **Choose payment item** for which you wish to record an opening balance against such as dinner money
- **Choose method** credit
- **Choose reason** other
- **Choose group 2** select the year group/All
- Click **Search**



Payer	Pupil	Year	Reg. group	Balance (£)	Amount	Quantity	Internal comment	Notes to payer
parent/guardian	Chloe Beale	4	4DD	0.00	5.20			
parent/guardian	Sophie Evers	4	4DD	0.00				
parent/guardian	Niall Ford	4	4DD	0.00	3.20			
parent/guardian	Skye Freeman	4	4DD	0.00				
parent/guardian	Daniel Lewis	4	4DD	0.00	12.60			
parent/guardian	Megan-Louise Morrison	4	4DD	0.00	7.80			
parent/guardian	Yasmin Wood	4	4DD	0.00				

Cancel Credit

- Type in the **Amount** to credit against each pupil
- Enter an Internal comment, where appropriate i.e. Opening balance
- Enter a Note to payer i.e. Opening balance: parents will see this against the transaction in their ParentPay online account

Click **Credit** and click **OK**.

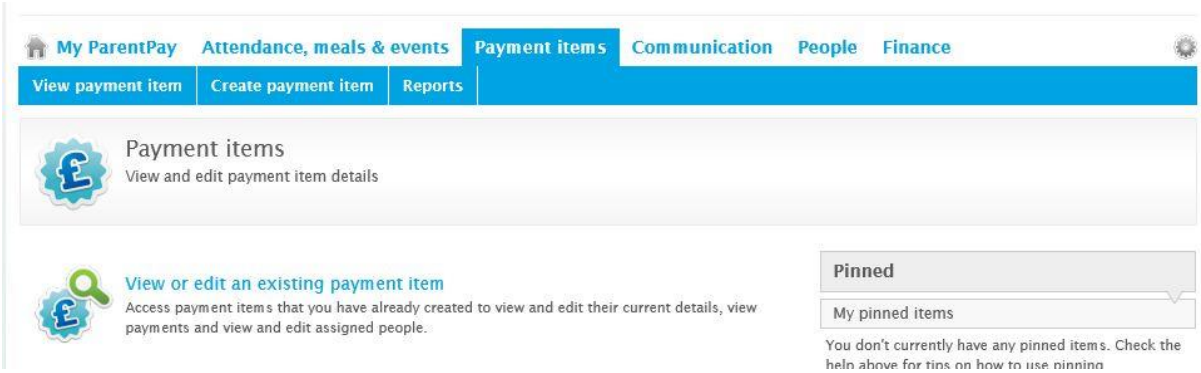
PayPoint card ordering

Schools that wish to enable their parents to continue paying cash but do not want to handle cash in school can opt to use PayPoint, allowing parents to make cash payments to school at local convenience stores.

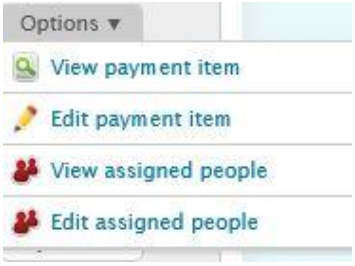
Currently PayPoint cards are only available for school meals payments; all other payment items use the PayPoint barcode letters generated using the ParentPay Communication Centre™.

Getting ready to order PayPoint cards

Go to **payment items> view edit an existing payment items**


My ParentPay
Attendance, meals & events
Payment items
Communication
People
Finance
View payment item
Create payment item
Reports
Payment items
View and edit payment item details
View or edit an existing payment item
Access payment items that you have already created to view and edit their current details, view payments and view and edit assigned people.
Pinned
My pinned items
You don't currently have any pinned items. Check the

- Locate the **School Meal** payment item on screen
- Click on the **Options>edit assigned people** icon

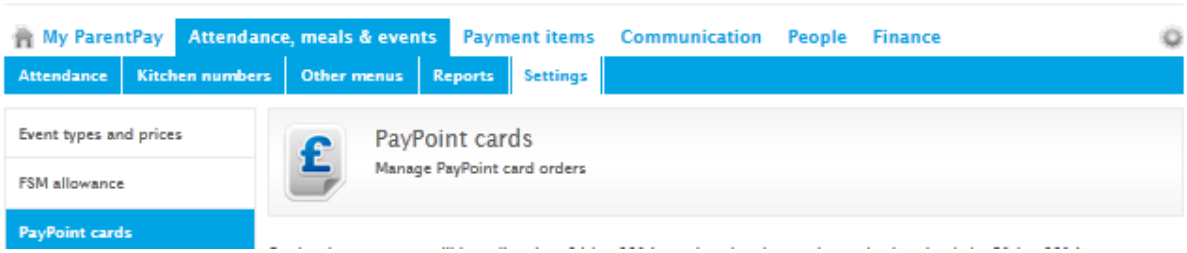


- Choose group 1: **Pupil**
- Choose group 2: select the appropriate year group from the drop down menu
- Click **Search pupils**

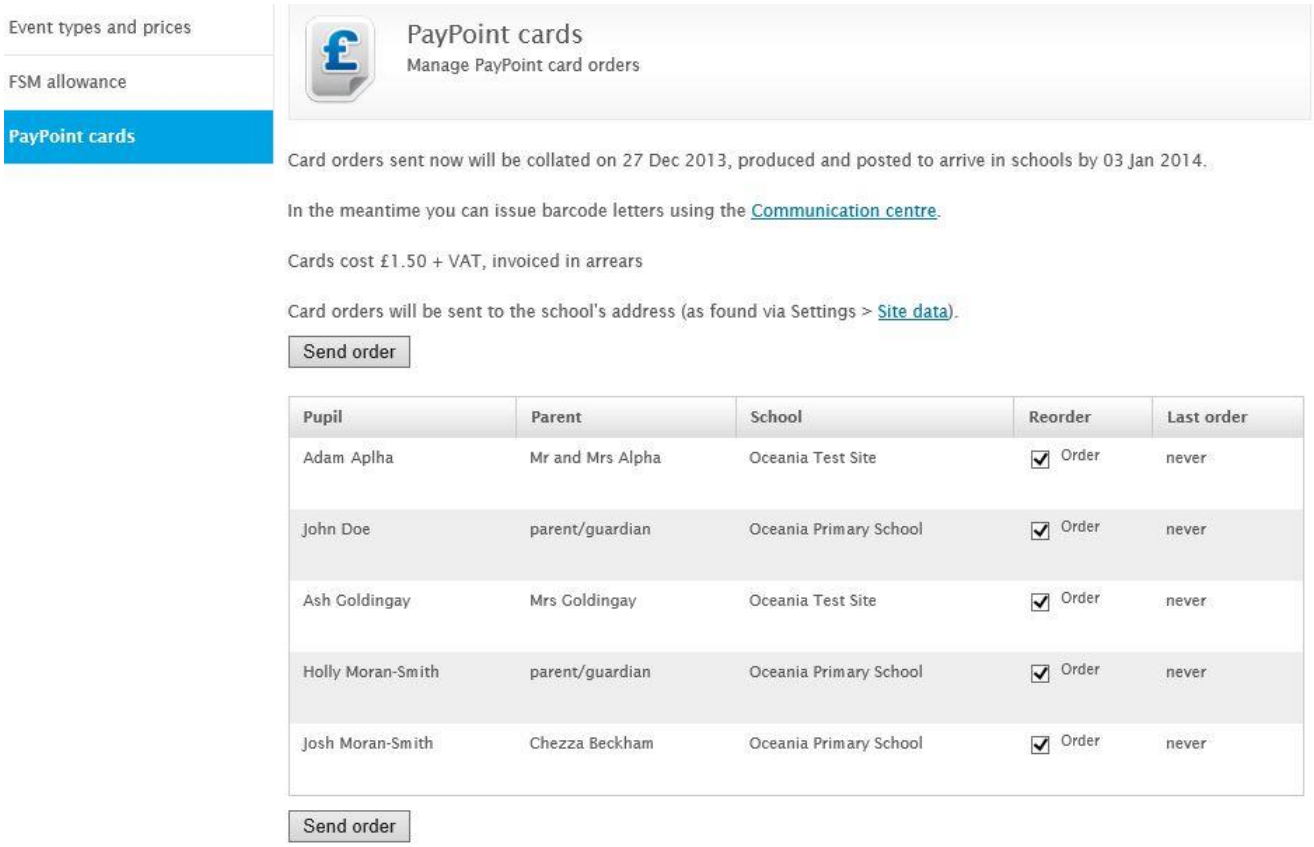
Tick the appropriate boxes in the PayPoint column and click **Save**.

Ordering PayPoint cards

Go to **Attendance, meals & events>Settings** and select **PayPoint cards**



A list of the pupils you have selected will appear, once you have checked that all the pupils are present and details correct, click **Send order**.



A message at the top of the screen will inform you of the date your order should arrive in school. NB: When you click Send order the pupils you have ordered a card for at that time will disappear from this screen; once the ParentPay Accounts Team have produced and posted the cards the pupil names will re-appear with a Re-order tick box alongside them in case you ever need to replace the card in the future.

PayPoint card order confirmation letter

Now that you have ordered your PayPoint cards you need to provide the parent(s) with a PayPoint barcode letter to make payments against until their card arrives in school for distribution.

To generate a PayPoint card order confirmation letter click **Communication>create letter**

- Click on **Create new message** in the **subject column**
- **Message run name area**: in the Type field type in the name of your template "PayPoint card order confirmation"
- **Printed letter area**: tick **Use for print**
- Click **Edit**
- **Copy and paste the letter template below into your template body**
  NB: when you copy and paste from word you may experience issues with layout and therefore you may need to enter line spaces manually.
- Click **Save**

<date/>

<miscontactname/>

<consumeraddress/>

Dear <miscontactname/>

Pupil: <consumerforename/> <consumersurname/> Class: <class/>

Paying via PayPoint

I am pleased to inform you that your PayPoint card has been ordered and should arrive in school within the next 10 working days.

In the interim, and to ensure you are able to keep your child's school meal account in credit, please take this letter to your nearest PayPoint store and make payment. The minimum payment amount is £xx.xx Please retain your payment receipt in case you need it as proof of payment in the future.

Once your card arrives, you will no longer need to use this letter to make payments.

If you have any queries, please contact the school office.

Yours sincerely

Headteacher

*Please allow up to 48 hours for funds paid via PayPoint to credit your child's account.

<paypointbarcode/>

- Click **Continue**

How to send area:

- **Priority**: Normal
- **Send to**: Primary payer only, one message/child
- Click **Continue**
- **Add recipients area**:
- **Assign your dinner money payment itemfor the barcode**:
    - **Add group**: use the drop down menu to **select Service – All assigned**
    - Use the now activate field below to **select your dinner money payment item**
    - Click **Add**

Assign your recipients:

- **Add group**: use the drop down menu to **select Year, Class, Individual pupil**
- Use the now active field/s below to **select the Year, Class, Class and Individual pupil**
- Click **Add**
- Click **Continue**

Click **Confirm send**

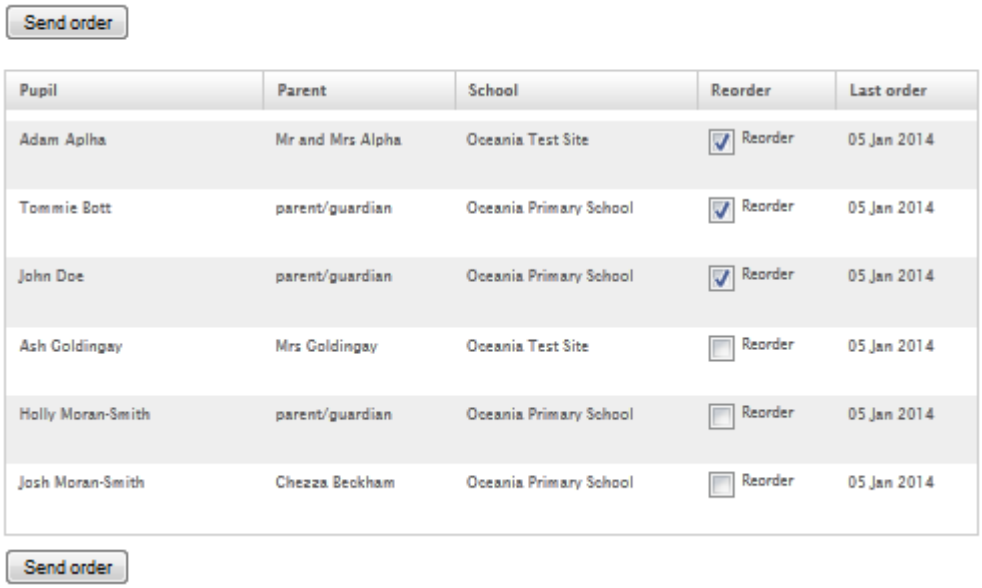
Click **Open pdf's** to print your letters.

Ordering replacement PayPoint cards

Go to **Attendance, meals & events > settings**

A list of the pupils you have previously ordered a card for will appear on screen.

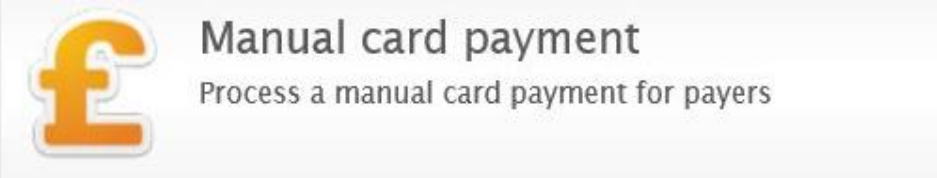
Tick the **Reorder box** and click **Send order**



Manual payment by pupil: card/cash/cheque

You can make a payment or add funds on behalf of a specific account holder either by phone from a debit/credit card, in cash or by cheque.

Click **Finance> Manual card payment**



If you know the name of the pupil that you would like to make payment for, type their surname in the **Name** box. Alternatively, select their year group using the drop down menu alongside **Choose group 2** and click **Search**.

Select the pupil and click on the **Make payment** under actions

Payer	Email	Pupil	Year	Reg. group	Username	Password	Created on	Actions
Chezza Beckham		Josh Moran-Smith	1	Black	VFCYMBZU	a46702348	18 Sep 2013	Make payment
parent/guardian		Holly Moran-Smith	1	Black	YNYXBFTC	a51425595	18 Sep 2013	Make payment
parent/guardian		Josh Moran-Smith	1	Black	ELGUAXXK	a49458553	18 Sep 2013	Make payment
parent/guardian		John Doe	1	Black	NCLVCSFE	ycam4c	18 Sep 2013	Make payment

Place a tick in the box alongside each payment item that the parent wishes to make payment for, and enter the amount if required.

Scroll to the bottom of the page and click **Continue**.

Select payment method by clicking the radial button to the left of **Pay by credit or debit card, Book in a cheque or Cash or other transfers** and click **Continue.**

Payment by card (if this is not an option on your screen contact us)
Enter the payer's card details and click **Make payment**.

Book in a cheque
Enter the amount and cheque number and click Submit

Cash or other transfers
Enter the amount and click **Submit**

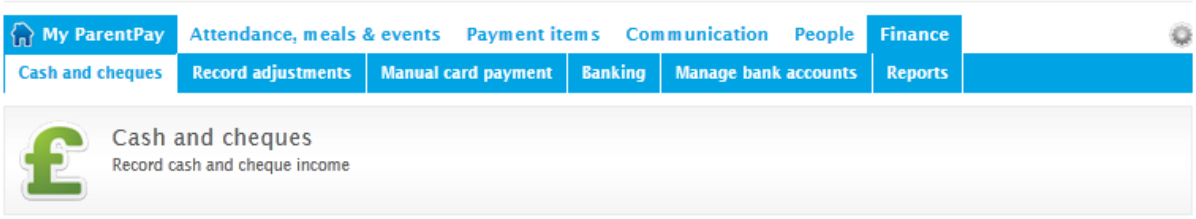
Confirmation of the successful transaction will appear on screen.

Entering cash or cheques received in school

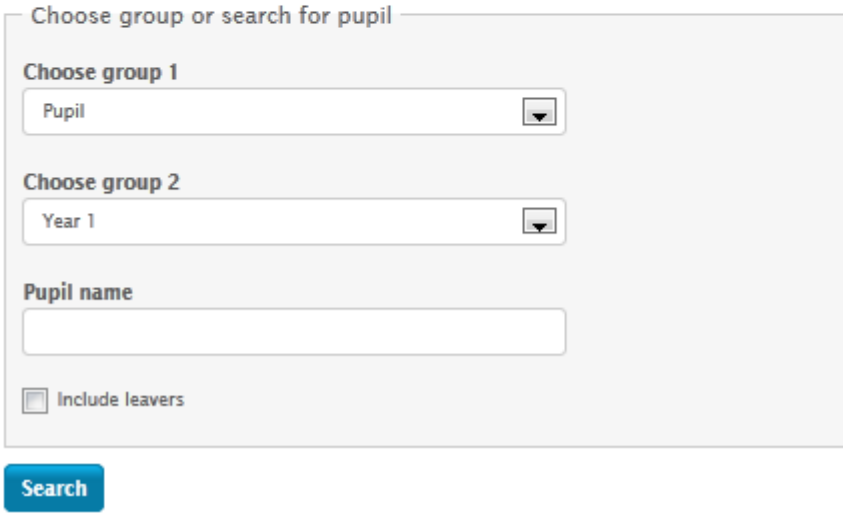
If you have multiple pupils to enter cash payments for the best way is via the Credit/debit screen in ParentPay.

Entering cash

Go to **Finance>Cash and cheques**



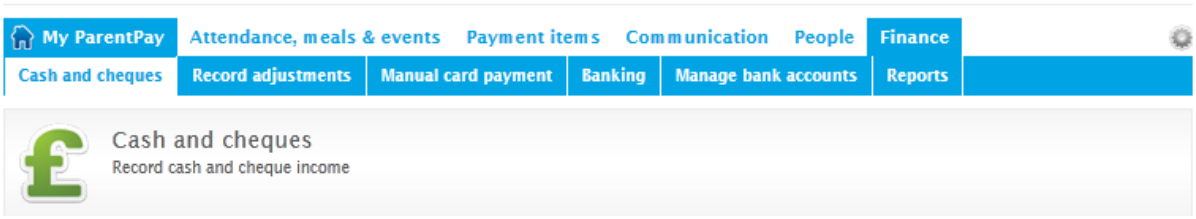
- **Choose Payment Item** for which you wish to record a payment
- **Choose method** credit
- **Choose reason** cash
- **Choose group 2** select the relevant class/year group or select All
- **Click Search**



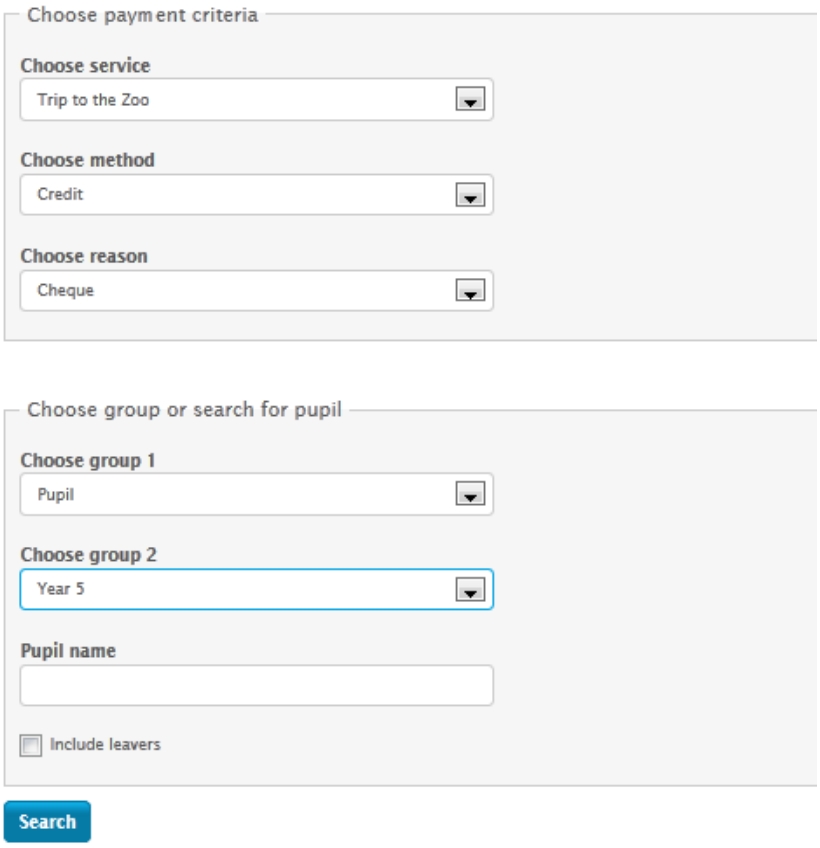
Enter the cash payments received against the correct pupil(s) and click **Credit**

Entering Cheques

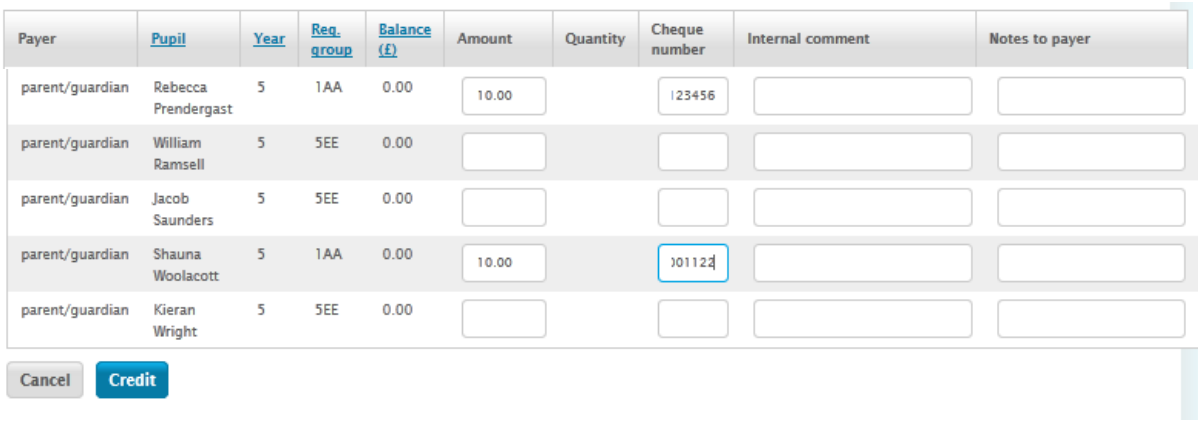
Go to **Finance>Cash and cheques**



- **Choose Payment Item** for which you wish to record a payment
- **Choose method** credit
- **Choose reason** cheque
- **Choose group 2** select the relevant class/year group or select All
- **Click Search**



Enter the cheque payments received against the correct pupil(s), remember to include the relevant cheque number and click **Credit**



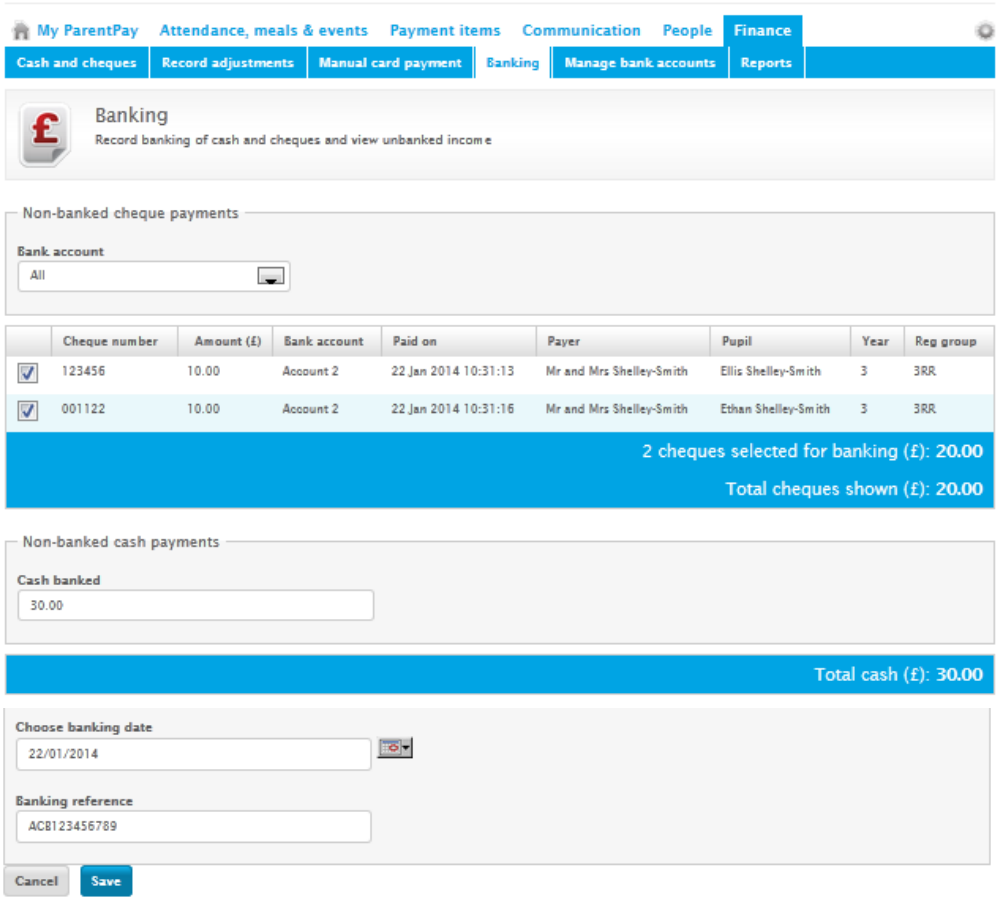
Banking cash and cheque payments

When you credit cash and cheque payments they are recorded in the section called **Banking**. When the payments are physically taken to the bank you will need to **Bank** them in ParentPay.

Click on **Finance> Banking**.

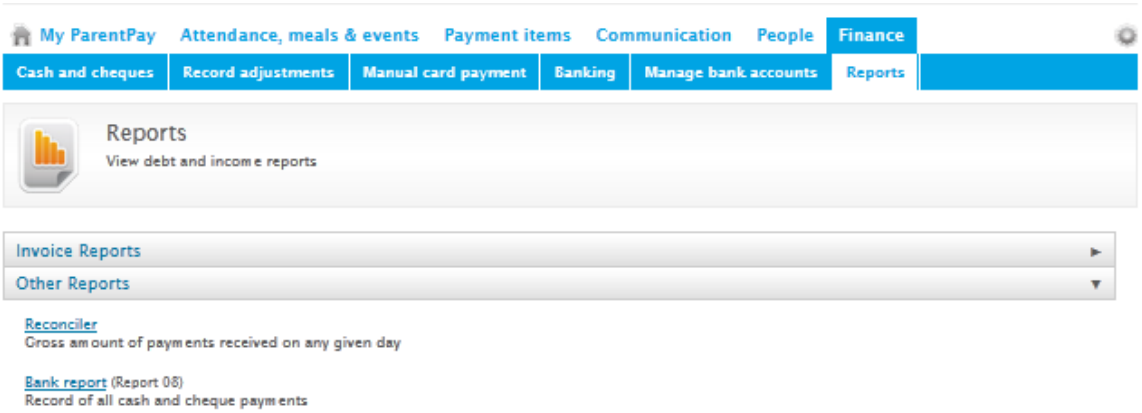
A list of the total non-banked cash and cheque amounts held is displayed. Cheques are automatically ticked to be banked, un-tick those that you do not wish to bank.

Type in the amount of cash you wish to bank in the **Cash banked** box, **Choose banking date, enter your banking reference if you have one** and click **Save**.

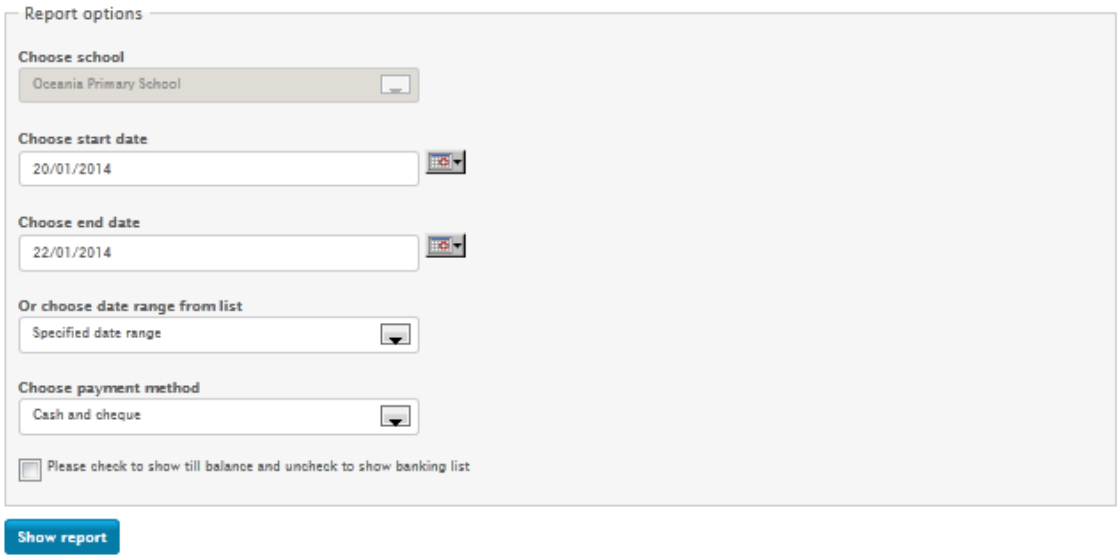


The selected cheques and cash amount entered now leave the system. On the payment report, cheques appear as **Processed** when entered on the system and **Settled** when banked.

An audit trail of your banking will be saved. You can access the Bank Report via **Finance>Reports** select **Other Reports** and run the **Bank report**



The bank report will confirm the cash and cheque bankings you have taken to the bank/post office or sent via security pickup.



Report 08 - Bank report, 20/01/2014 - 22/01/2014, Cash and cheque, banking list

Oceania Primary School

Cheque bankings

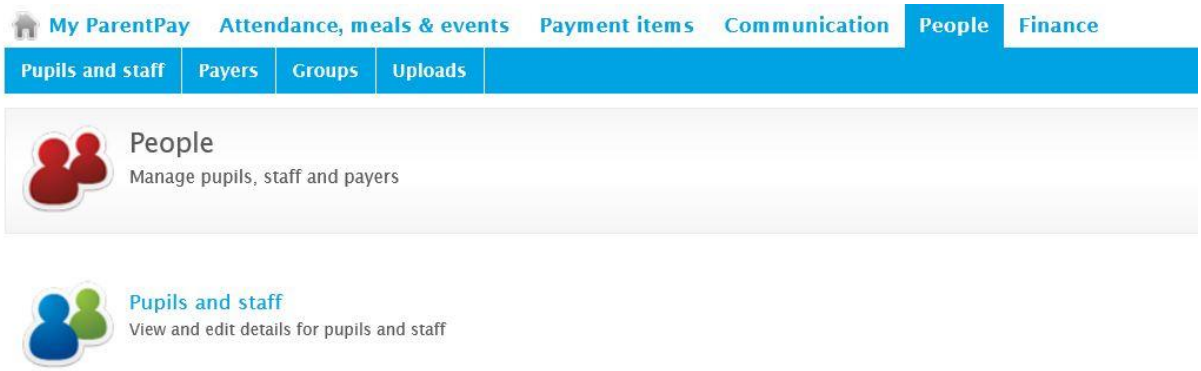
Pupil	Payer	Cheque number	Year	Amount (£)	Paid on	Banked on	Banking ref	Bank account
Rebecca Prendergast	parent/guardian	123456	5	10.00	22 Jan 2014	22 Jan 2014	test	Account 2
Shauna Woolacott	parent/guardian	001122	5	10.00	22 Jan 2014	22 Jan 2014	test	Account 2
								Total (£) 20.00

Cash bankings

Amount (£)	Banked on	Banking ref
		Total (£) 0.00

Checking balances

Go to **People>Pupils>Pupils & staff**

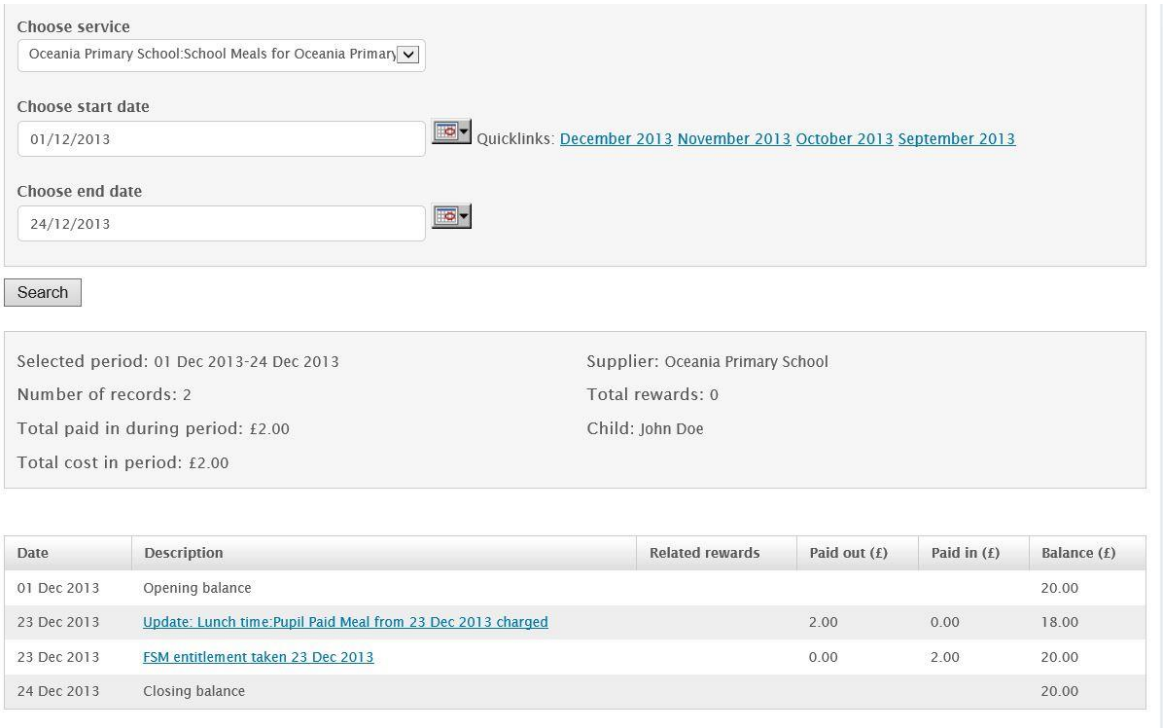


- **Choose group 1:** Pupil
- **Choose group 2:** select the year group the pupil is in
- Click **Search**

NB: if you need to look at a leaver's account tick the Include leavers tick box

- Locate the pupil on screen and click the **Statement icon** under the actions tab.
- **Choose payment item:** select the payment item the balance is for
- Choose your **Start and End dates** to search between

Click **Search**



Moving money to other accounts or other payment items

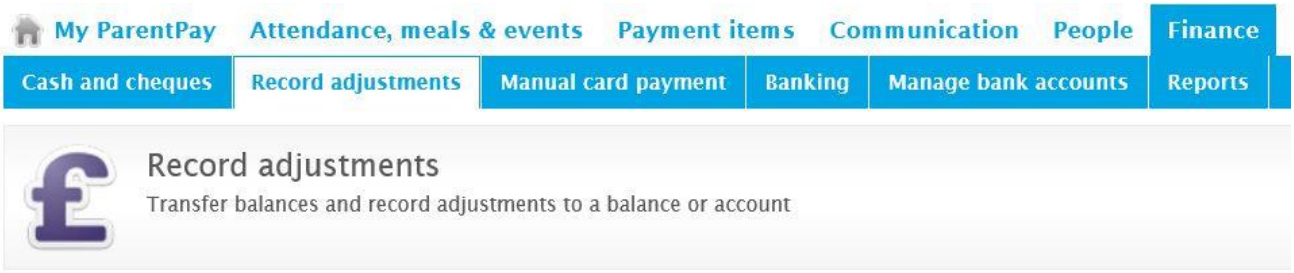
You can move money to other accounts or to other payment items providing both payment items that you need to move money between have funds settled to the same bank account.

Instances that you may need to use this facility:

- A parent makes a payment for the wrong payment item for their child
- A parent overpays for a sibling
- A child leaves the school with credit on their account and the parent wants it moving to the sibling account in school

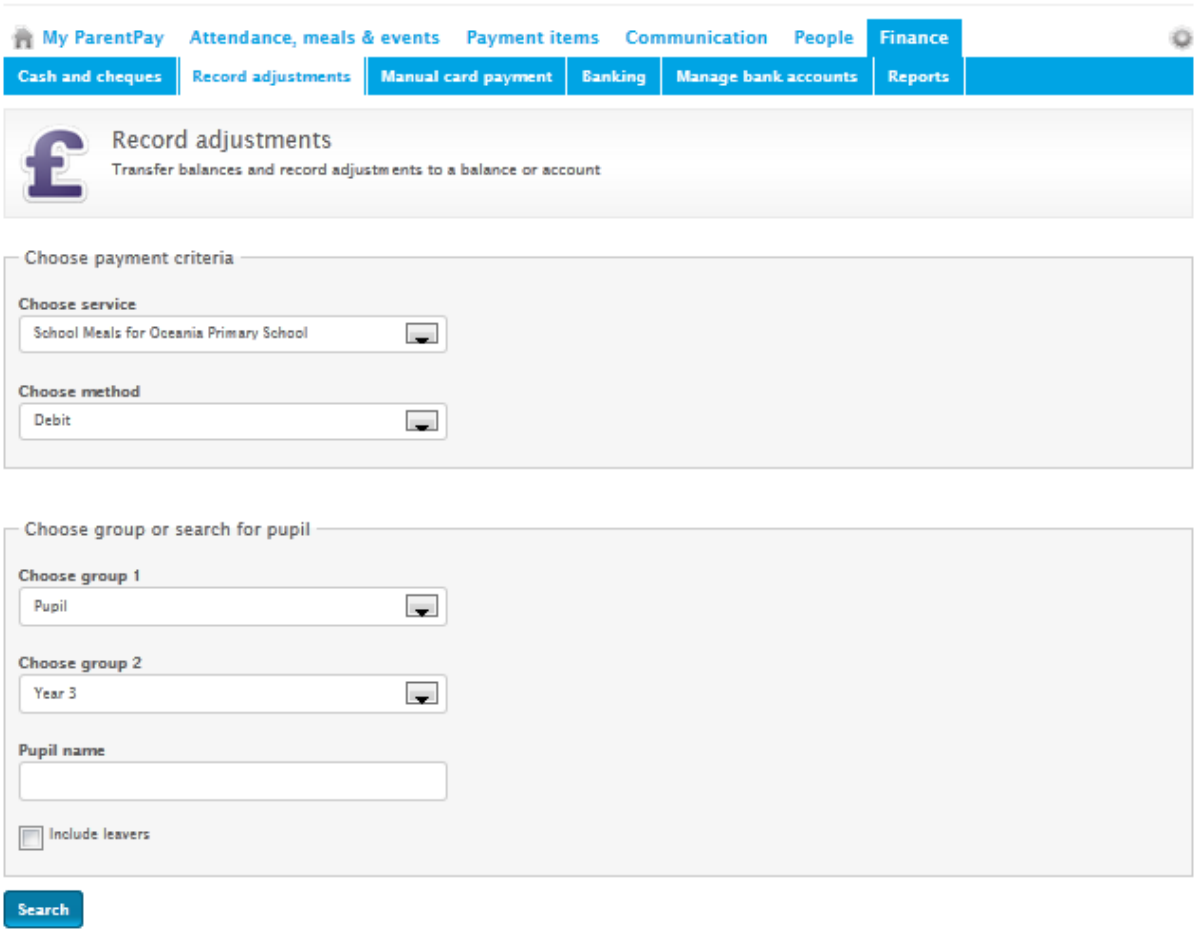
First: you need to debit the pupil/payment item you want to move money from

Go to **Finance> Record adjustments**



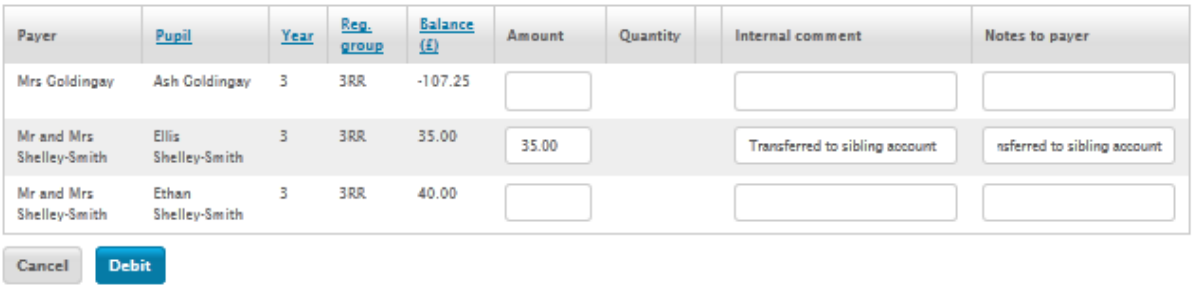
Using the drop down menus:

- **Choose payment item** that you wish to move the money from
- **Choose method** debit
- **Choose group 2** select the year or reg group of the pupil
- Click **Search**



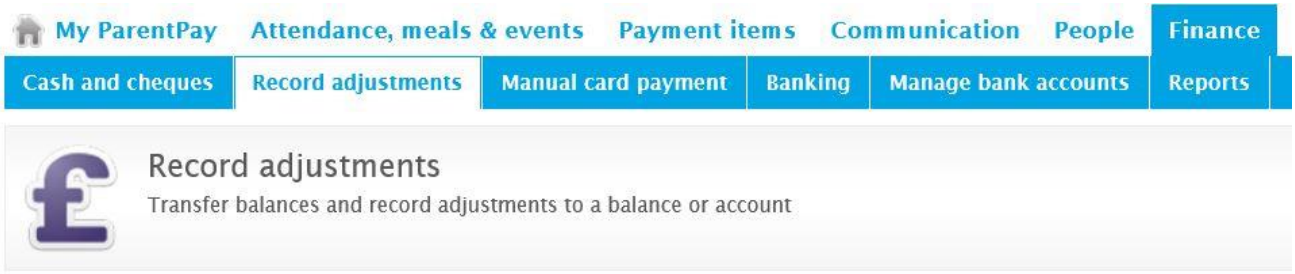
Enter the amount you need to debit against the correct **account** and ensure you place a note in the **Internal Comments** and **Notes to Payer** box to provide evidence of your actions for the audit trail.

Click **Debit**



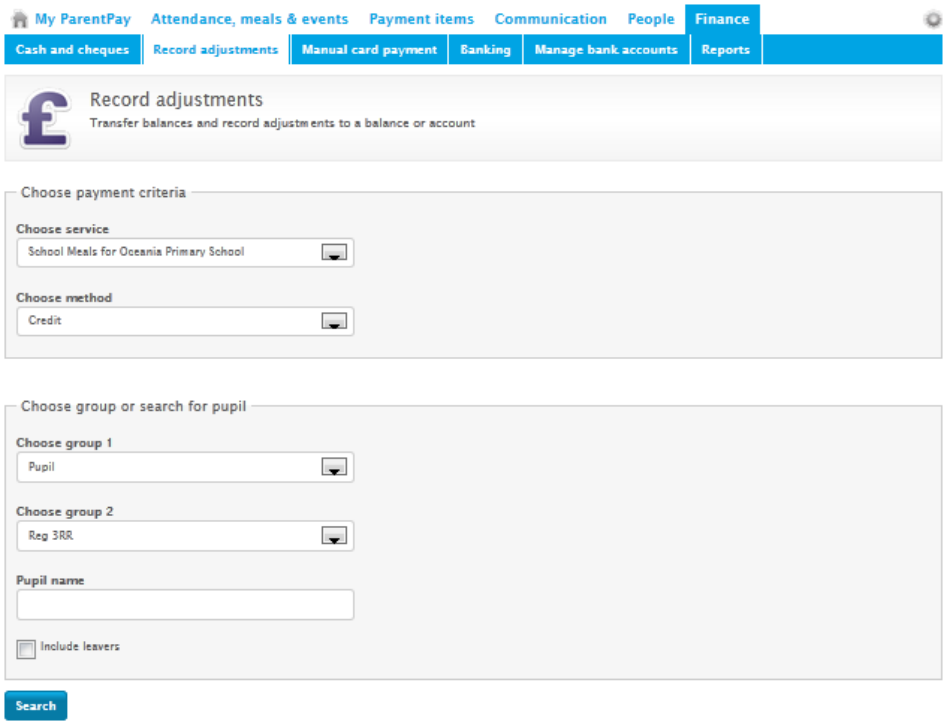
Next: you need to credit the pupil/payment item you want to move money to

Go to **Finance> Record adjustments**



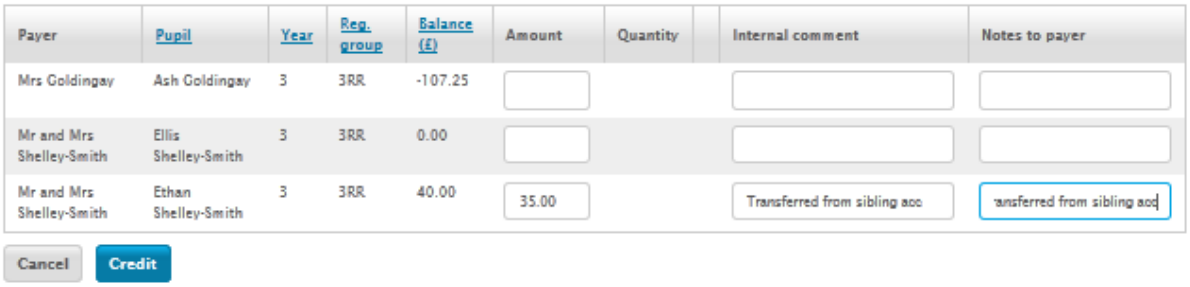
Using the drop down menus:

- **Choose payment item** that you wish to move the money from
- **Choose method** credit
- **Choose group 2** select the year or reg group of the pupil
- Click **Search**



Enter the amount you need to credit to the correct **account** and ensure you place a note in the **Internal Comments** and **Notes to Payer** box to provide evidence of your actions for the audit trail.

Click **Credit**



Refunds

Debit/Credit Payments: A card payment can be:
reversed if it has not been settled and was not made as part of a cross-school transaction.
refunded after it has been settled

Please note that transaction charges are applied to refunds. Both processes are carried out in the same way. You can refund all or part of a payment.

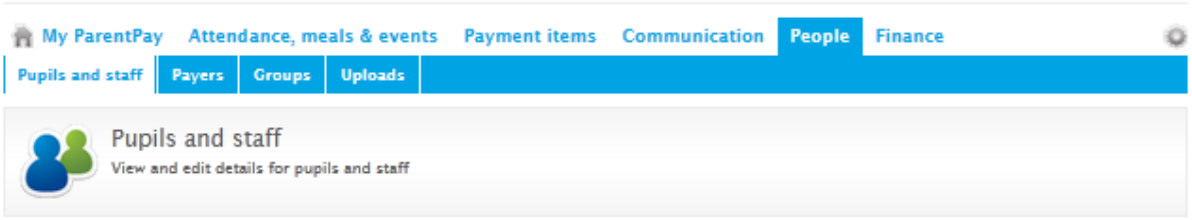
Cash and cheque payments: These can be cancelled in ParentPay if they have not been banked and the cash/cheque returned to the parent. If a cash/cheque payment has been banked we recommend recording a refund as an "other adjustment" and refunding the parent via school cheque.

PayPoint: At present PayPoint payments need to be recorded as an "other adjustment" and refunded by school cheque.

NB: The ability to create a PayPoint Barcoded Credit Note will be a feature offered by PayPoint in the future.

To refund an online payment or cancel a cash/cheque payment

- Go to **People>Pupils and staff**



- **Choose group 1:** Pupil
- **Choose group 2:** select the year group the pupil is in
- Click **Search**

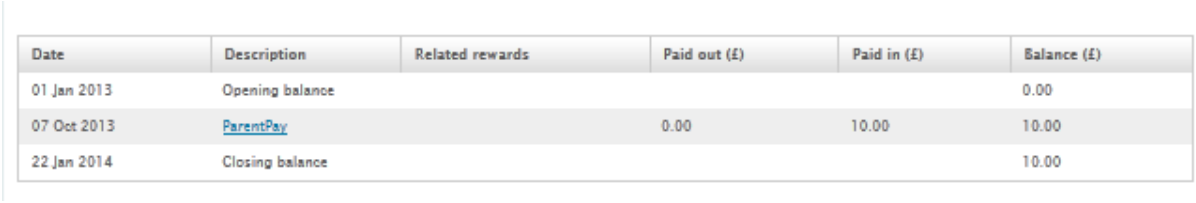
NB: if you need to refund to a leaver tick the Include leavers tick box
Locate the pupil on screen and select **View Statement** from the drop down menu

C9371351 Gina Sankey 3 3CC 25 Jul 2000 Actions
893724337 Becky Sheedy 3 3CC 24 Jun 2000 Actions
00H007 Ellis Shelley-Smith 3 3RR 12 Dec 2004 Actions
00Z006 Ethan Shelley-Smith 3 3RR 12 Dec 2004
A19841984 Winston Smith 3 3CC 19 Aug 2000
D93724321 Harry Stevens 3 3CC 22 Aug 2000
C937351412 Louis Taylor 3 3CC 06 Jun 2000
Z372219333 Reece Whiting 3 3JJ 20 Jun 2000 Actions
Edit pupil details
Manage FSM periods
Report on this diner
View statement

- select the **payment item** the refund needs to actioned against
- Use the **Start and End dates** to find the payment
- Click **Search**

The links in the **Description** column take you through to the actual payment, definitions can be as follows:

ParentPay	Online/debit or credit card payment
PayPoint	cash payment made via PayPoint
Credit: Cheque payment	cheque payment entered using Manual payment by pupil or credit/debit screen
Credit: Cash payment	cash payment entered using Manual payment by pupil or credit/debit screen
Other adjustment	other payments entered via Credit/debit screen



Date	Description	Related rewards	Paid out (£)	Paid in (£)	Balance (£)
01 Jan 2013	Opening balance				0.00
07 Oct 2013	ParentPay		0.00	10.00	10.00
22 Jan 2014	Closing balance				10.00

Click on the clickable link in the Description column to access the payment receipt screen for the online or unbanked cash/cheque payment

Click **Refund/Reverse Payment** or **Cancel Cash/Cheque Payment**

NB: Payments reversed never go anywhere; the payment process is simply cancelled. They are not sent back to the payer's card as the payment has not been processed therefore the transaction will not show on the payer's bank statement – it is literally as if it never took place at all! If you need to reverse payment that was part a cross-school transaction, please contact our Service Desk Team who will be happy to do the reversal for you.

ParentPay Dinner Money™

No two schools manage school meals in the same way! You will already have started to develop the way you do things so please decide what process works best for your situation!

Meal patterns and groups

To enable ParentPay Dinner Money™ to automatically tick the attendance screens, you can allocate meal patterns to groups of pupils. YOU ARE FREE TO CHOOSE WHETHER THIS WORKS FOR YOU OR NOT.

This would only normally be done during your setup or at the beginning of an academic year/term.

First you need to set up a group to allocate the meal pattern to.

SIMS users

Firstly are all the children who have dinners recorded as having a school dinner or free meal in SIMS Section 9 – 'Additional information'?
If the answer is no, you will need to update your SIMS pupil data in section 9 'Additional information' to reflect this so when you create a meal group every child who has a meal in school will automatically be put in the meal group for you.

Please watch out for any children ticked in section 9 as having **sandwiches or home** that are also recorded in section 6 'Dietary' under meal patterns as having even one day recorded as a meal - this should be deleted/altered as this one day will put them into the meal group, which is not what you want if they are having only sandwiches or going home every day.

Once this data is updated in SIMS, run MIS:Sync to refresh your ParentPay site.

Click on **People > Groups**

In the Group description section

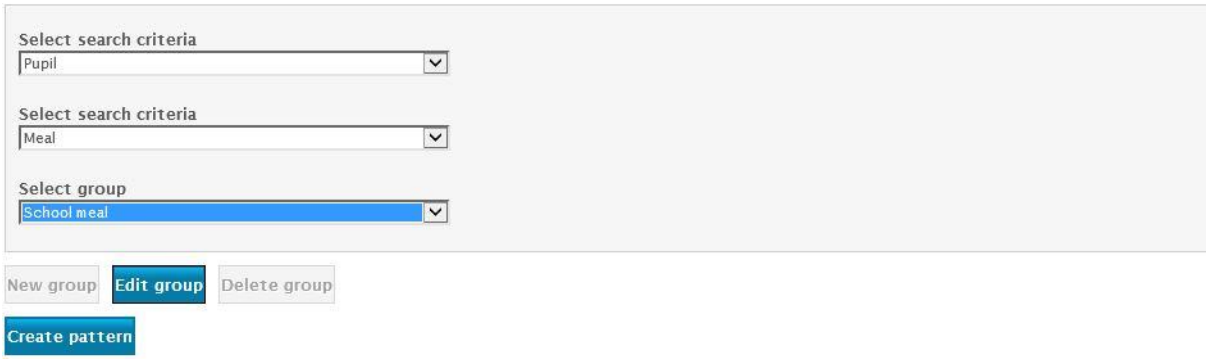
- Select search criteria **Pupil**
- Select search criteria **Meal**
- Select group **School meal**
- Click Edit Group

The list that comes up will reflect the changes you have made in SIMS and then refreshed through MIS:Sync. Edit this group as necessary.

You can then create a meal pattern for all/some of these children by doing the following:

Create a meal pattern

- Go to **People>Groups**
- Select search criteria: Pupil
- Select search criteria: Meal
- Select group: School meal
- Click **Create Pattern**



Un-tick the children that the meal pattern you are creating does not apply to, or leave them all ticked.

You then have a couple of options 1) you can create a pattern Monday to Friday from the next day until the end of term/year etc for all the ticked children or 2) just select the children that have meals on a particular day/s Monday, Wednesday, Friday etc.

Click **Save and Finish** when you have created each pattern.

NB: Meal patterns cannot overlap - if they do ParentPay Dinner Money™ will warn you and ask you to confirm in order to overwrite the information!

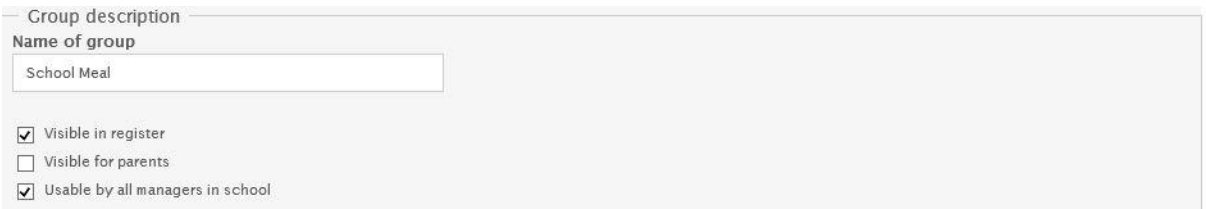
Non-SIMS users

First you need to create your **Meal group** in ParentPay.

Click on **People >Groups**

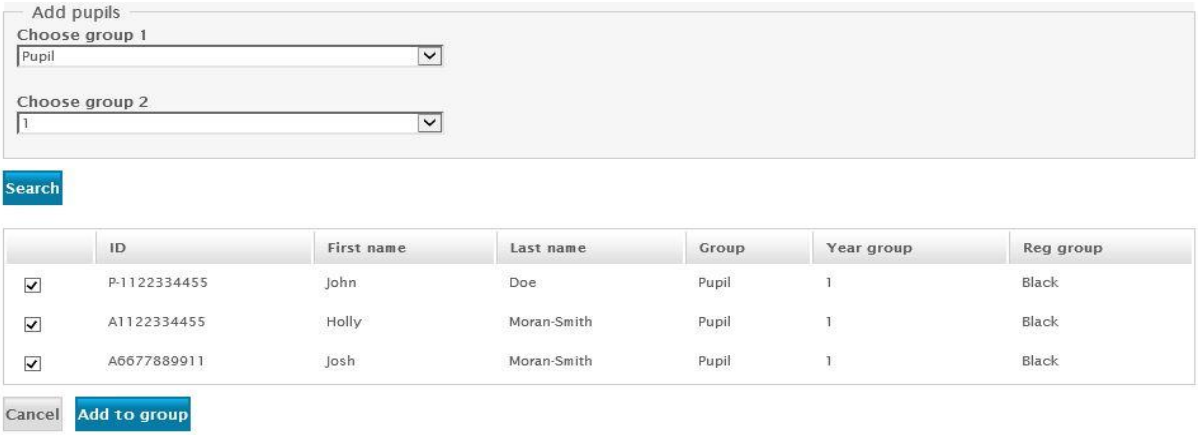
In the Group description section

- Click on **New group**
- **Name** your group: School meal
- Tick **Visible in registers**
- Tick **Usable by all managers in school**



In the **Add pupils section**

- Choose group 1: Pupil
- Choose group 2: select a year group or leave as ALL
- Click **Search**
- **Tick** the pupils to add to your group
- Scroll down to the bottom of the page and click **'Add to group'**



In the **Pupils section**

- Click **Save**

Next you need to create a meal pattern for your group.

Create a meal pattern

- Go to **People >Groups**
- Select search criteria: Pupil
- Select search criteria: Meal
- Select group: School meal
- Click **Create Pattern**

Un-tick the children that the meal pattern you are creating does not apply to, or leave them all ticked.

You then have a couple of options 1) you can create a pattern Monday to Friday from the next day until the end of term/year etc for all the ticked children or 2) just select the children that have meals on a particular day/s Monday, Wednesday, Friday etc.
Click **Save and Finish** when you have created each pattern.

NB: Meal patterns cannot overlap - if they do ParentPay Dinner Money™ will warn you and ask you to confirm in order to overwrite the information!

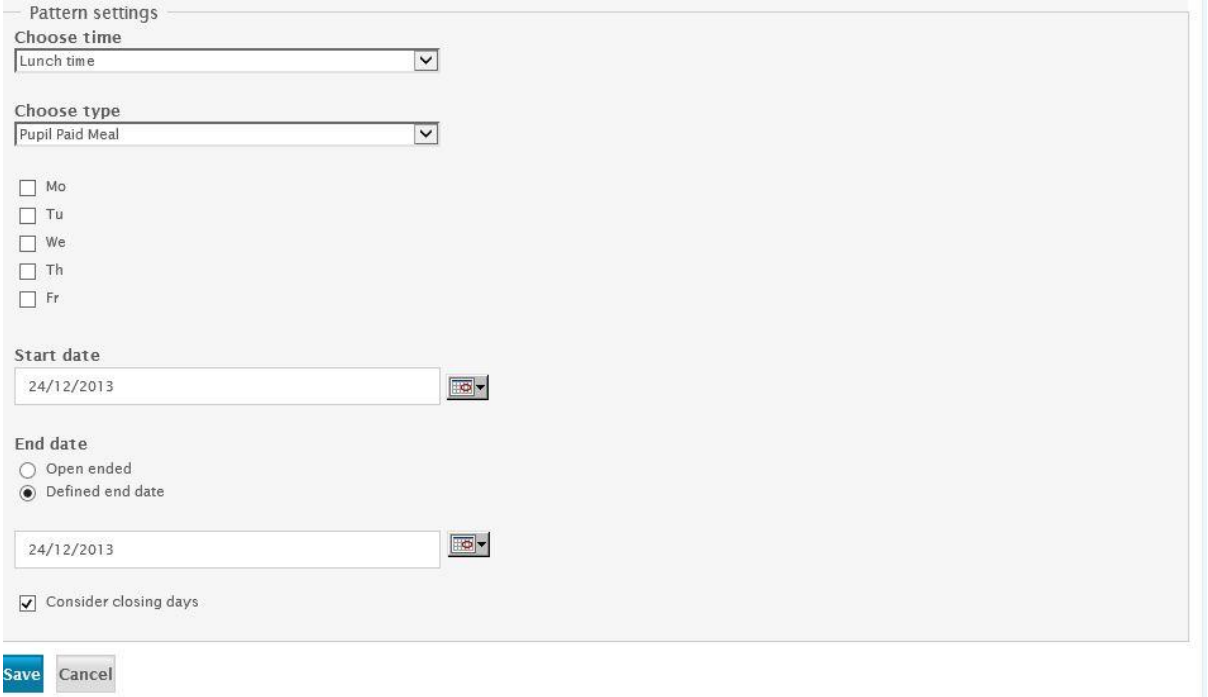
Editing/removing meal patterns for an individual

Go to People > **Pupils and Staff**

- Choose group 1: Pupil
- Choose group 2: select the year group, class the pupil is in

Locate the pupil on screen and click on the actions column and select 'Edit Pupil Details'
Go to the **Event Pattern section** and click on **Add event** or click on the **Edit icon**

You can then add a pattern by ticking the day boxes and putting in the dates or you can edit the pattern by giving it an end date.



You can also 'Bin' the pattern here if you have done it wrong or it is no longer needed.
Click Save and Finish.

Print daily/weekly meal registers

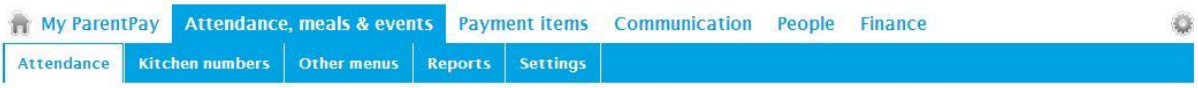
- Click on **Attendance, Meals and events**
- Click on Reports
- Select Register Reports
- Click Register
- Choose group 1: Pupil
- Choose group 2: Select a class or leave to print all
- Select the information you would like to include on your registers
- Click **Show day** or **Show week**
- Scroll down to the bottom of the register
- Click **Print as pdf**

Register reports
Register (Report 04)
View and print event registers
Advanced event supervisor report (Report 13)
Advanced register report for event supervisors

Record attendance

Recording your meal attendance in ParentPay has never been easier! Use the below guidance to help you record how many of your pupils are taking a meal, whether they are being charged for the meal and the type of meal they are taking.

From the home screen, click **Attendance, Meals & Events** in quick links



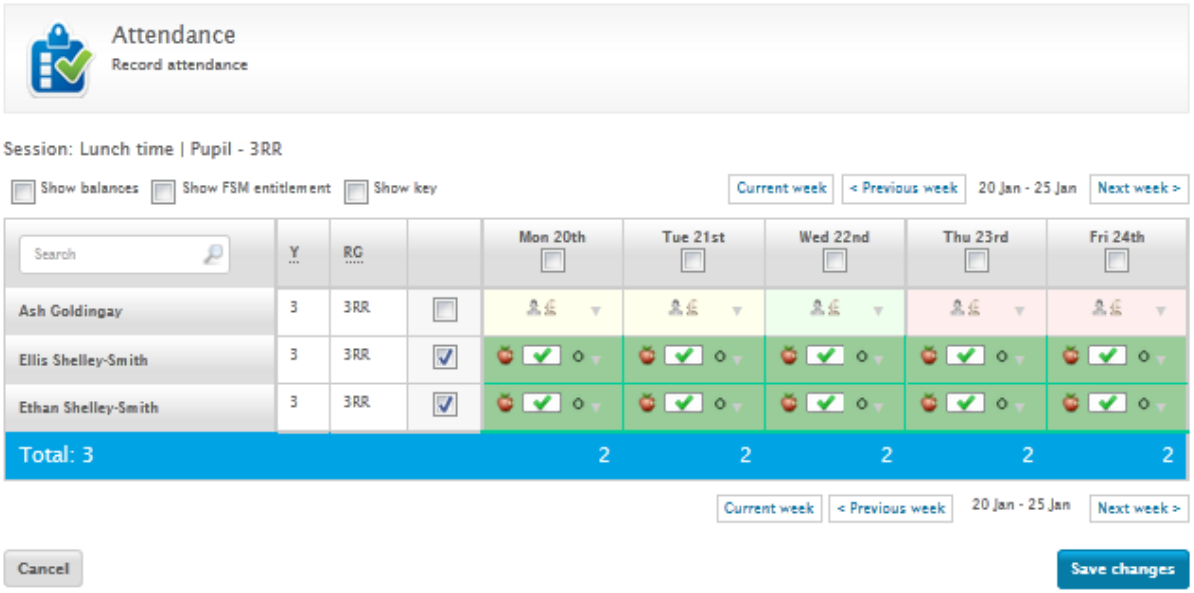
- Click on **Record Attendance**
- Event time: **Lunchtime**
- Group 1: **Pupil** (or Staff, Visitors etc)
- Group 2: **Select a class or leave as ALL**
- Choose **date**
- Click **Show day** or **Show week**

NB: If you want to view past attendance for leavers you will need to tick the **Include Leavers** box.

You can also use the options at the top to show your **Free School Meal entitlement**, to show the pupils **account balance,** and to also view the **Event Key**.

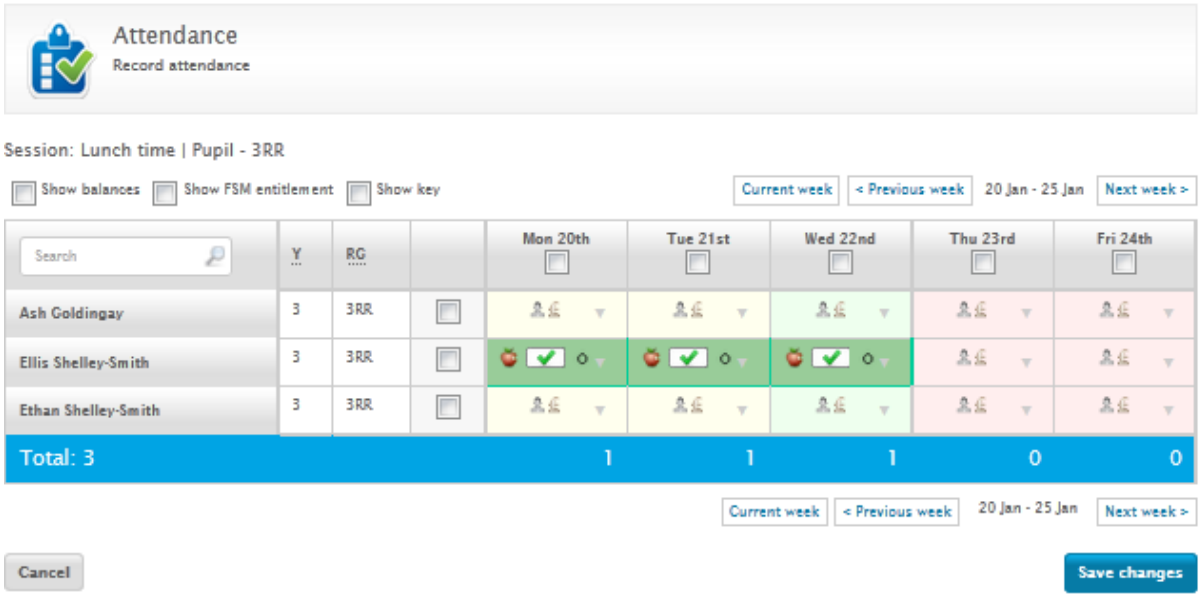
You will see a list of students, next to their year and registration group. You will also see the specific day you have selected, or the whole week.

If you have set meal patterns, your attendance screen will show the attendance according to those patterns.



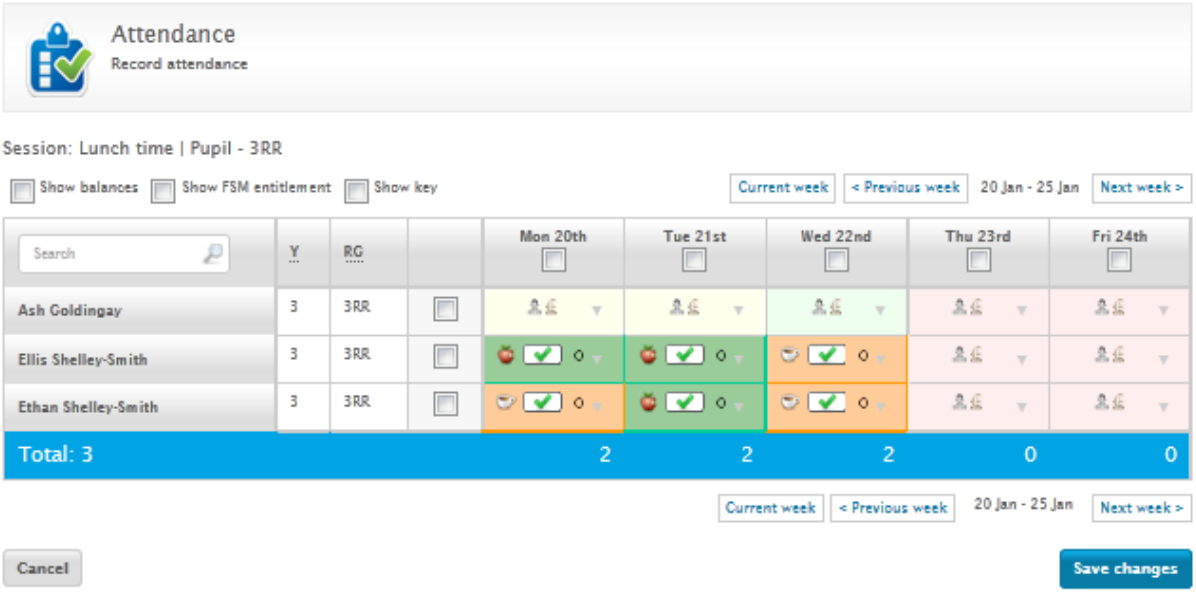
If you are recording attendance manually (for example you have not set up patterns) or you are removing attendance you will have the option to mark/unmark attendance manually.

In order to record attendance click on the pound sign for a specific student and it will change colour to your default event type and put a green tick in the box, which signifies that a meal has been taken and billed (charged for).



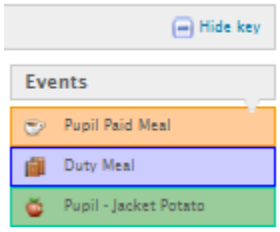
If you have more than one meal type set up (for example you provide a Hot Meal and Jacket Potato meal) you are able to toggle between meal types to ensure pupils (or staff) are recorded as having the correct meal.

To toggle between meals you need to click on the icon to the left of the green tick.



This will also allow you to toggle your other event/meal types and change event/event types, for example 'Staff paid meal', or 'Staff duty meal'.

Your event types are all shown in a key, you can view this by clicking the 'Show Key' box at the top of the page.



If you wish to remove a meal recorded in error, or a child did not end up having a meal on a specific day, you can simply click on the green tick and click save, this will cancel the attendance by removing the meal and will adjust the pupils balance accordingly.

Once you have recorded your attendance remember to click **Save**.

Remember - You can use the white tick boxes next to the listed names, or below the week day to populate the meals for an entire day, or week for an individual student or whole group selected.

Print meal numbers

You are able to print meal number reports to provide to you kitchen/canteen staff.

There are several reports available. The most popular report is Report 05 which gives a summary of the meal numbers, however a lot of schools also use Report 13 which is the Advanced Event Supervisor list.

To access the reports go to **Attendance, meals and events>Reports**

- Click on **Attendance, Meals and Events**
- Click on Reports
- Select 'Summary returns general' (Report 05) or the report you require
- Choose **Start and End date**: Leave today's date
- Click Show report
- Click Download to Excel to print

Report 05 - summary returns general - All

Oceania Primary School

Total 22 Jan 2014 - 23 Jan 2014

Meal numbers

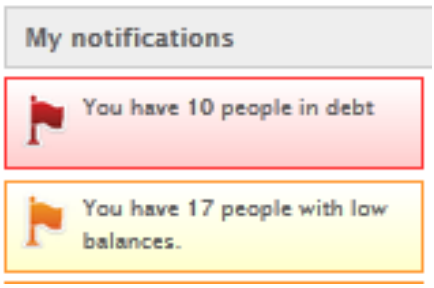
	Pupil	Staff	Visitors	Others	Total
Attendant	122	0	0	0	122
Billed	115	0	0	0	115
FSM	7	0	0	0	7
Value billed meals(£)	241.50	0.00	0.00	0.00	241.50
Value free meals(£)	14.45	0.00	0.00	0.00	14.45
VAT element billed meals	0.00	0.00	0.00	0.00	0.00

Kitchen numbers

If you need to record your meals served in ParentPay you can do so via **Attendance, Meals and Events > Kitchen Numbers**. Some schools and Local Authorities use this to track the difference between the number of meals booked and the number of meals served to identify where discrepancies may lie.

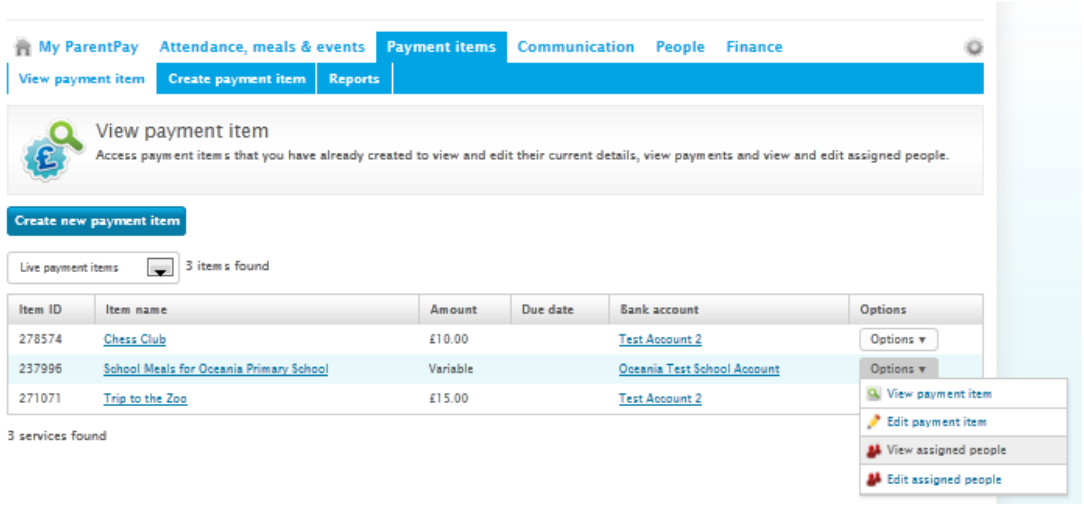
Debt management

ParentPay Dinner Money™ allows instant identification of pupils whose accounts have gone into debt. Just click on the **Debt link** under the '**My Notifications' section** on your home page to get a quick view of who is in debt.

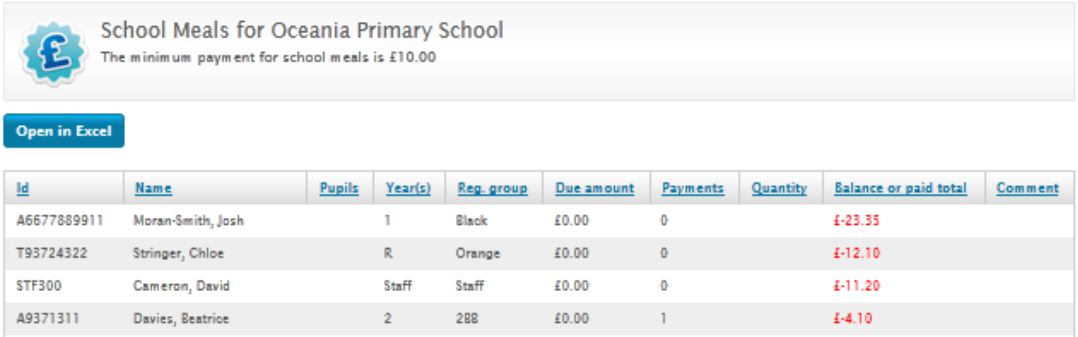


From the Debt Notification page you can continue to the Communication area to produce Debt Reminders for parents whose accounts are showing a debt.

You can also see a full overview of the credits and debits on the pupils accounts by going to **Payment Items>View Payment Items** and clicking **View assigned people** from the drop down menu next to your school meal payment item.



This will provide a breakdown in BALANCE ORDER of the pupils/staff/visitors assigned to the School Meal payment item and their outstanding credit or debit balance. The pupils marked £0.00 will be your free meal/sandwich/home pupils.

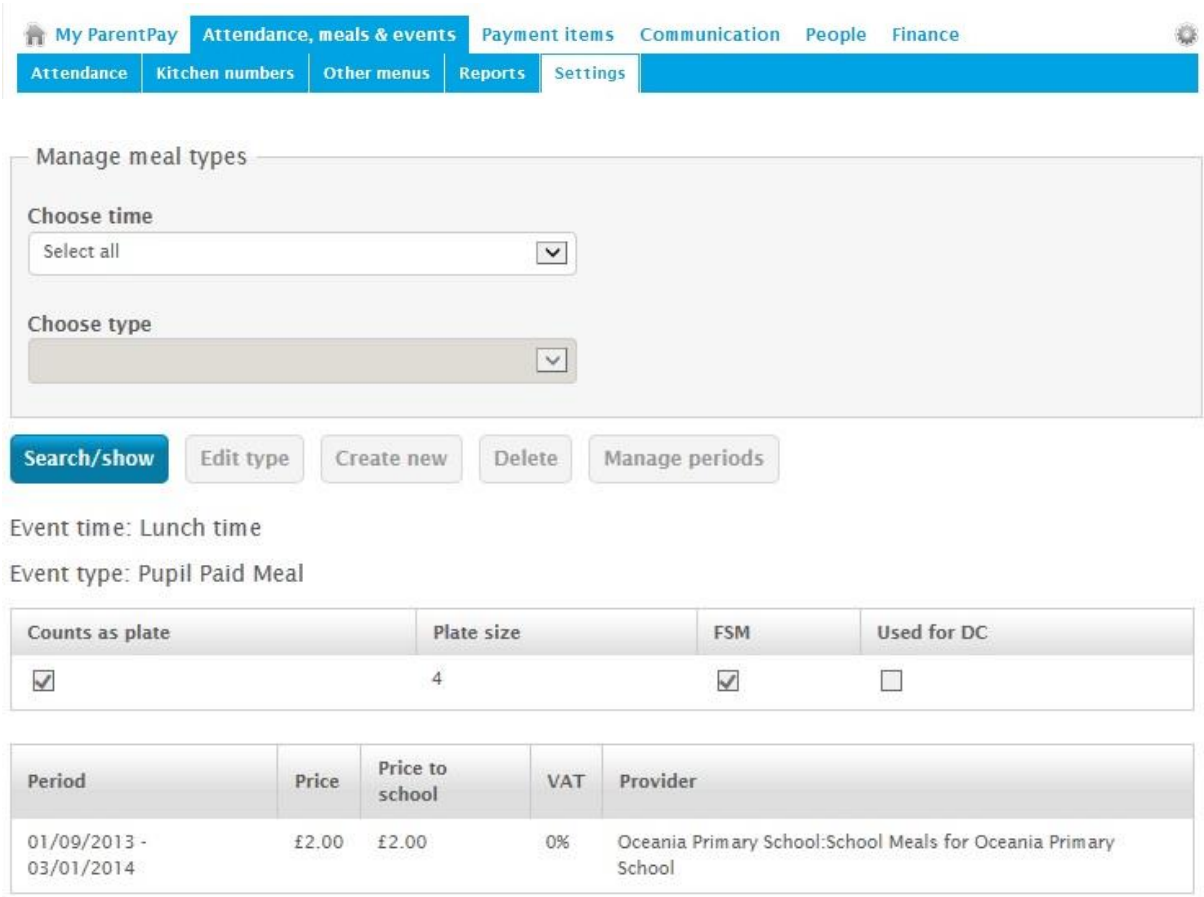


Breakfast and after school clubs

In addition to managing your school meals you are also able to manage and record attendance for breakfast and after school clubs.

NB: Before following the instructions below you will need to setup your breakfast or after school club up as a Repeatable, variable payment item or contact our support team to request a Bookable/selectable item if you wish parents to be able to book sessions online and assign your pupils.

Go to Attendance, Meals & Events>Settings



- Choose Time: **Breakfast**
- Click **Create new**
- Give the Event a name for example Breakfast Club
- You do not need to tick Count as Plate or FSM Related
- You can choose a Plate size to match your school set up however it will not affect the Breakfast Club set up if you leave this as the default
- Click **Save**

If you are setting up an After School Club complete the process above but Select time: After School.

Go back to **Attendance, Meals & Events>Settings**

- Choose Time **Breakfast**
- Choose Type **Breakfast Club** (or the name you entered)
- Click **Manage periods**
- Enter the date range i.e. Academic Year and set the cost as the cost of each breakfast club session
- Select the payment item you created that parents will be crediting payments to
- Click **SAVE**

Repeat the process for your After School Club if necessary.

When you next go to **Attendance, Meals & Events>Attendance** you will see that you are now able to record attendance for Breakfast Club/After School Club and parents will be charged the session amount you have set in the Meal types screen.

NB: If the cost of the sessions increases you will need to create a new period to reflect this.

Meal Bookings and Selections

Some schools use ParentPay's Meal Booking and/or Selection service. This involves parents booking the meals they want their children to take via their ParentPay account instead of the school recording the attendance via the Manager Account.

There are two types of bookable services:

Meal Bookings: Parents have the option to state the day that they want the pupil to have a meal. No choices can be made, the parent simply ticks to state they want to book a cooked meal on a particular day

Meal Selection: Parents have the option to select the meal choices they want the pupil to have for example fish, potatoes and peas followed by yoghurt

Setting up and managing bookings in school

ParentPay will send you a checklist and spreadsheet that you need to complete. There are a few steps to take, and you will need to contact our support team for advice and assistance with this process.

What you need to supply us with

A completed 'bookings' setup checklist – tell us what rules to enforce such as pay on bookings, how many days in advance of the meal being served should parents not be able to edit/make bookings and so on.

or

A completed 'selections' menu spreadsheet – complete the spreadsheet with your menu items, enter the rotation dates for your menus - our support team can help with this.

Once we have the above we can setup your booking or selection service.

Actions you will need to take in your ParentPay site

Ensure your calendars are correct

Go to **Settings>Manage Calendar**

Manage term dates: check your term dates are correct for the period, where there are no term dates enter your term dates for each half term in the associated periods

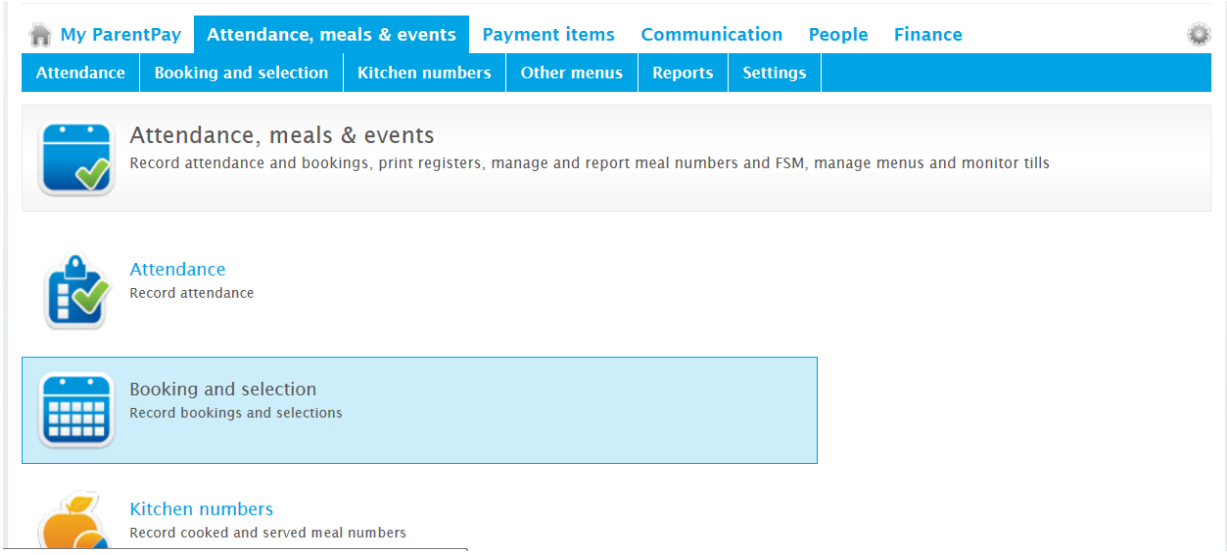
Manage closing days: setup any INSET days, adhoc closing days and so on.

Click **Save**

Making selections via the Manager account

Make selections for a day or week at a time

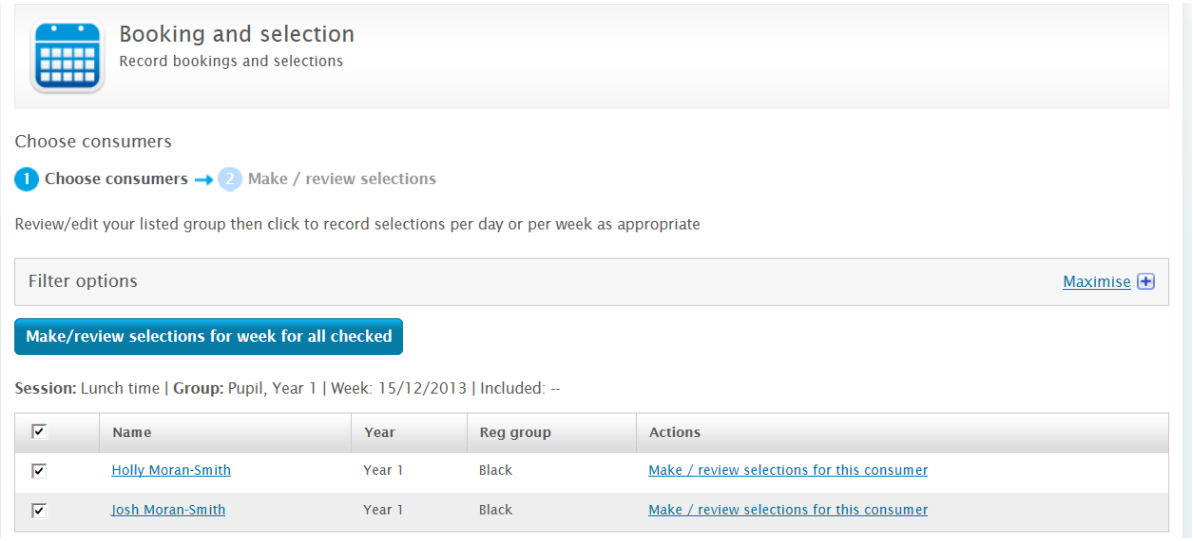
Go to **Attendance, meals & events>Booking and Selection**



Session time: select Lunch time, Breakfast etc
Group 1: Pupil (bookings/selections are currently only available for the pupils group)
Group 2: choose year group, custom group or ALL
Date: enter or select the date from the calendar

Tick to **Include leavers** or **Show account balance and FSM status** if you would like this data to show on screen whilst you are making your selections.

Click **View consumers**


Booking and selection
Record bookings and selections
Choose consumers
1 Choose consumers → 2 Make / review selections
Review/edit your listed group then click to record selections per day or per week as appropriate
Filter options
Maximise
Make/review selections for week for all checked
Session: Lunch time | Group: Pupil, Year 1 | Week: 15/12/2013 | Included: --
Name
Year
Reg group
Actions
Holly Moran-Smith
Year 1
Black
Make / review selections for this consumer
Josh Moran-Smith
Year 1
Black
Make / review selections for this consumer

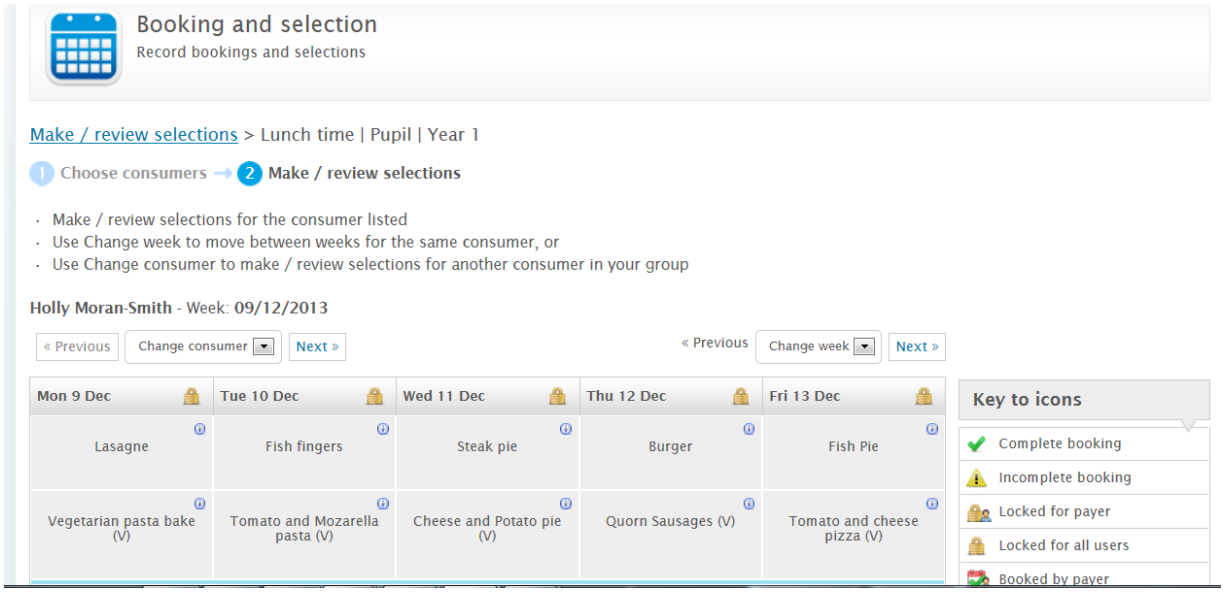
Make selections for all/some consumers in the group

Click on:

OR

In the event there are consumers that you do not want to make selections for, you can:

a) Un-tick the tick box alongside their name (as in the above screenshot)
b) Click Make/review selections for day/week for all checked and simply not make any selections for those consumers


Booking and selection
Record bookings and selections
Make / review selections > Lunch time | Pupil | Year 1
1 Choose consumers → 2 Make / review selections
· Make / review selections for the consumer listed
· Use Change week to move between weeks for the same consumer, or
· Use Change consumer to make / review selections for another consumer in your group
Holly Moran-Smith - Week: 09/12/2013
« Previous
Change consumer
Next »
« Previous
Change week
Next »
Mon 9 Dec
Tue 10 Dec
Wed 11 Dec
Thu 12 Dec
Fri 13 Dec
Lasagne
Fish fingers
Steak pie
Burger
Fish Pie
Vegetarian pasta bake (V)
Tomato and Mozarella pasta (V)
Cheese and Potato pie (V)
Quorn Sausages (V)
Tomato and cheese pizza (V)
Key to icons
Complete booking
Incomplete booking
Locked for payer
Locked for all users
Booked by payer

Make the selections required by clicking on menu item required for that day/each day that week.

NB: your changes are stored as you go along, therefore it is only necessary to click Save changes when you have finished making all your selections.

If, at any time, you need to go back to the previous screen, click on **Back to previous step** button at the bottom of the page.

In the event that you have made wrong selections for a consumer click on the **Revert this week** button to restore the original selections.

Make future selections

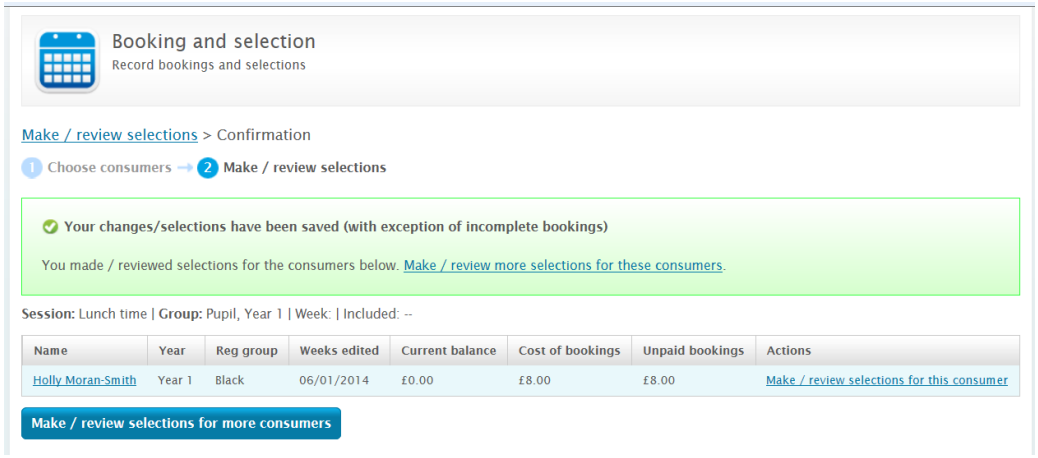
To continue to make selections for this individual consumer for the following week or future weeks use the **Change week drop down** to select the week commencing date or click **Next>>** alongside the drop down field.

Change the consumer for whom you are making selections

Use the drop down menu **Change consumer** to choose another consumer from the list or click on **Next>>** to go to the next consumer in the list.

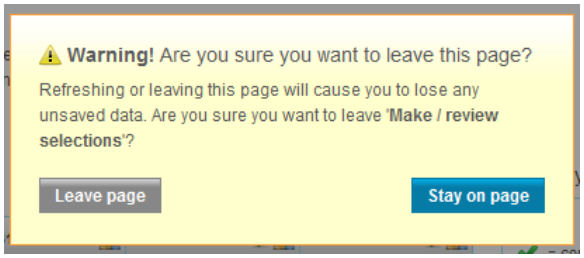
When you have finished making all your selections click **Save changes**

You will see confirmation of the weeks edited, current balance, total cost of bookings you have made and the total amount of unpaid bookings for all consumers you have made selections for during this session.



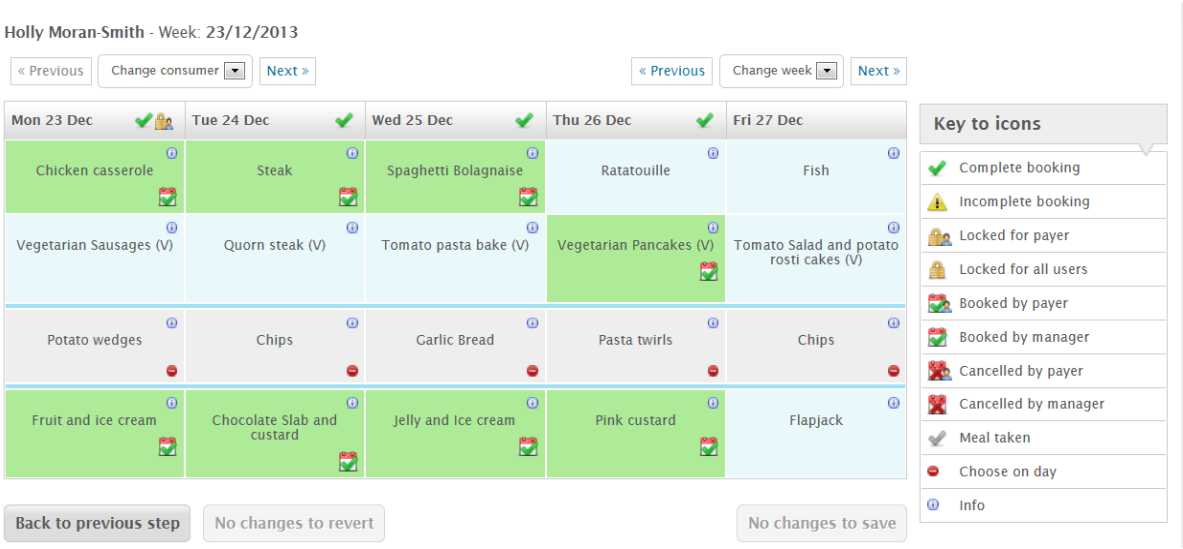
You can return to the landing page of the bookings tab by clicking on the **Make/review selections for more consumers** button.

In the event that you navigate away from the bookings screens without clicking on Save changes, you will be see a 'warning' message on screen


Warning! Are you sure you want to leave this page?
Refreshing or leaving this page will cause you to lose any unsaved data. Are you sure you want to leave 'Make / review selections'?
Leave page
Stay on page

Make selections for an individual in the group

Click on **Make/review selections for this consumer**



Make the selections required by clicking on menu item required for that day/each day that week.

NB: your changes are stored as you go along, therefore it is only necessary to click Save changes when you have finished making all your selections.

If, at any time, you need to go back to the previous screen, click on **Back to previous step** button at the bottom of the page.

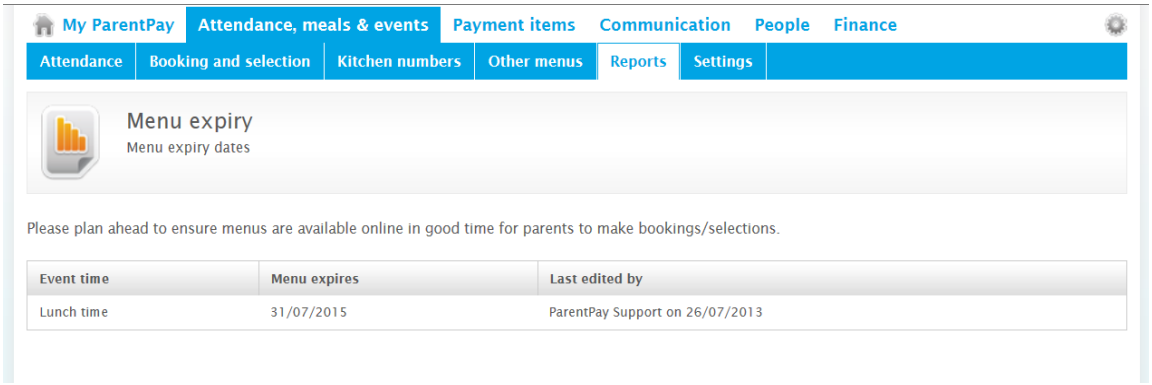
In the event that you have made wrong selections for a consumer click on the **Revert this week** button to restore the original selections.

Click **Save changes**

Menu expiry dates

It is important that schools know when their menus/booking events expire, to ensure they have sufficient time to change them and allow parents to continue to view and book without interruption.

Click on the **Attendance, Meals and Events > Reports.** Then click on Booking Reports and Menu Expiry



ParentPay will need at least **three weeks' notice** to extend/create new menus on your site.

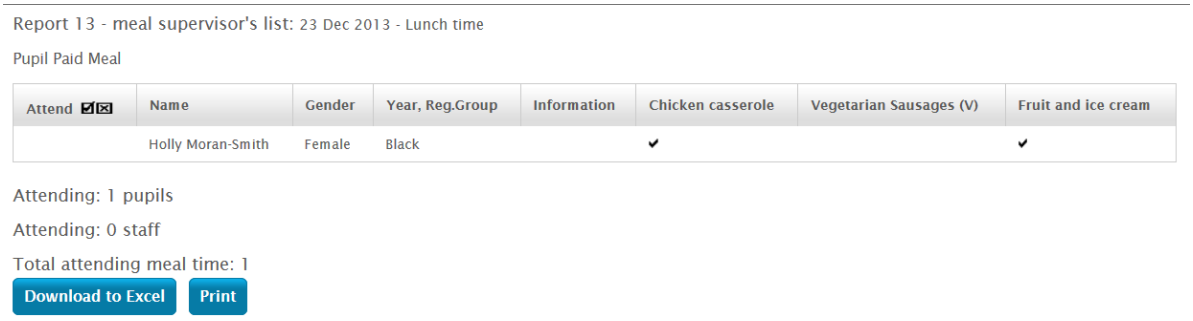
Reporting on meals and bookings

There are various meal related reports for you to use as well as some specific bookings reports.

Report 13: Meal supervisor's list (daily)

Go to Attendance, Meals and Events > Reports

Select Register Reports and then select Advanced Event Supervisor report (Report 13)



Report 23: selections production report

- ✓ Week to view
- ✓ Booked taken meals in the past
- ✓ Booked meals in the future
- ✓ Dietary requirements by child

Go To Attendance, Meals and Events > Reports

Select Booking Reports then select Selections Production Report (Report 23)

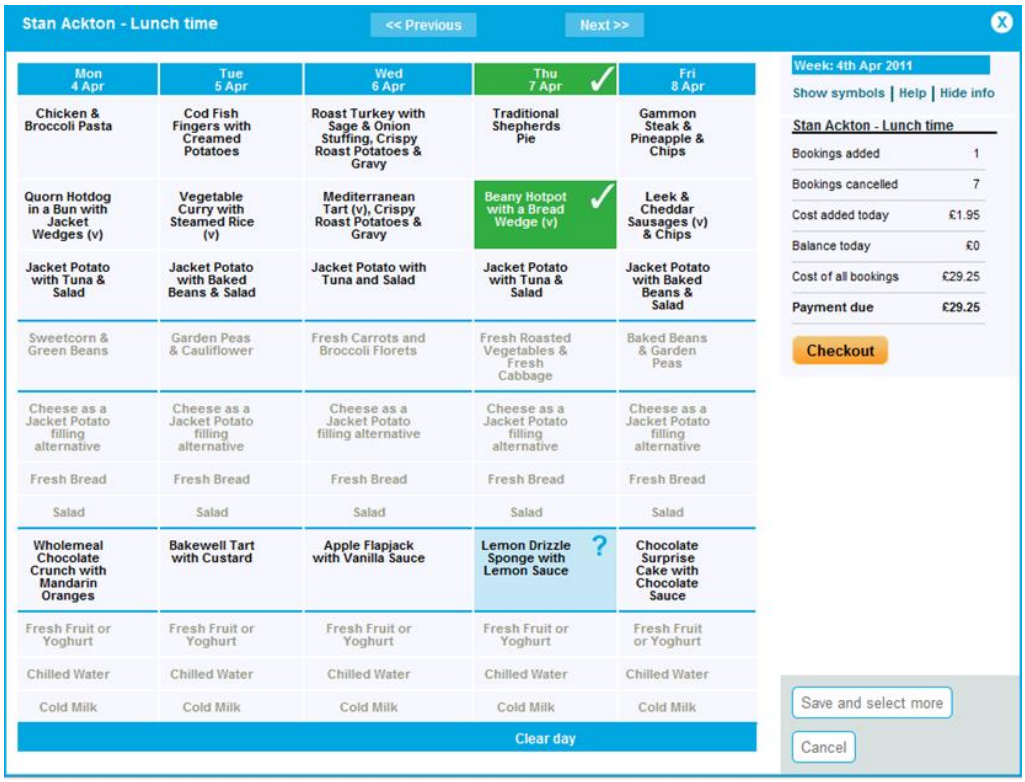
Report 23 - Selections production report w/c 23 Dec 2013 Lunch time , Pupil Paid Meal - Pupil

Last booking changes for Monday: Payers 23 Dec 2013 09:00, Managers 23 Dec 2013

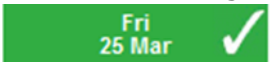
Max in group	118	118	118	118	118
Choice	Mon 23/12	Tue 24/12	Wed 25/12	Thu 26/12	Fri 27/12
Main Course 1	Chicken casserole	Steak	Spaghetti Bolagnaise	Ratatouille	Fish
	1	1	1	0	0
Main Course 2	Vegetarian Sausages (V)	Quorn steak (V)	Tomato pasta bake (V)	Vegetarian Pancakes (V)	Tomato Salad and potato rosti cakes (V)
	0	0	0	1	0
Dessert 1	Fruit and ice cream	Chocolate Slab and custard	Jelly and Ice cream	Pink custard	Flapjack
	1	1	1	1	0
TOTAL bookings:	1	1	1	1	0
TOTAL non-booked:	0	0	0	0	0
GRAND TOTAL:	1	1	1	1	0

How parents make bookings

- Login to ParentPay
- Click the Bookings tab and choose what, who and when to make bookings for
- Reviewing current bookings (selections) and making more


Stan Ackton - Lunch time
<< Previous
Next >>
Mon 4 Apr
Tue 5 Apr
Wed 6 Apr
Thu 7 Apr
Fri 8 Apr
Chicken & Broccoli Pasta
Cod Fish Fingers with Creamed Potatoes
Roast Turkey with Sage & Onion Stuffing, Crispy Roast Potatoes & Gravy
Traditional Shepherds Pie
Gammon Steak & Pineapple & Chips
Quorn Hotdog in a Bun with Jacket Wedges (v)
Vegetable Curry with Steamed Rice (v)
Mediterranean Tart (v), Crispy Roast Potatoes & Gravy
Beany Hotpot with a Bread Wedge (v)
Leek & Cheddar Sausages (v) & Chips
Jacket Potato with Tuna & Salad
Jacket Potato with Baked Beans & Salad
Jacket Potato with Tuna and Salad
Jacket Potato with Tuna & Salad
Jacket Potato with Baked Beans & Salad
Sweetcorn & Green Beans
Garden Peas & Cauliflower
Fresh Carrots and Broccoli Florets
Fresh Roasted Vegetables & Fresh Cabbage
Baked Beans & Garden Peas
Cheese as a Jacket Potato filling alternative
Fresh Bread
Salad
Wholemeal Chocolate Crunch with Mandarin Oranges
Bakewell Tart with Custard
Apple Flapjack with Vanilla Sauce
Lemon Drizzle Sponge with Lemon Sauce
Chocolate Surprise Cake with Chocolate Sauce
Fresh Fruit or Yoghurt
Chilled Water
Cold Milk
Clear day
Week: 4th Apr 2011
Show symbols | Help | Hide info
Stan Ackton - Lunch time
Bookings added 1
Bookings cancelled 7
Cost added today £1.95
Balance today £0
Cost of all bookings £29.25
Payment due £29.25
Checkout
Save and select more
Cancel

- Click a cell to select a choice
- Click the cell again to de-select a choice
- When sufficient selections have been made, the day/date box at the top of the column will change from blue to green with a white tick.



- Click to Save and select more or Checkout

FAQ's

When are bookings charged to accounts?

Bookings will be charged to an account on the day the session takes place.

I am using bookings for meals – when are meal numbers recorded?

You will see meal numbers appear in your usual meal reports as and when the meal sessions take place – just as you have done in the past using ParentPay Dinner Money.

Who will be able to use it and is there an extra charge?

There is no additional charge for existing ParentPay users – if you are not already using ParentPay Dinner Money just submit our Support request form and we will switch Bookings on for you.

Our catering's provided by an outside caterer/the LA, who sets this up for us?

If you are part of a Caterer or Local authority project with ParentPay which is moving to Bookings, then the likelihood is that your new Dinner Money payment item will be configured for you. You will hear more from our Project Manager for your area when it is time for you to start using Selections.

What reports are available for Schools and which are available to Caterers and Local authorities?

All ParentPay's existing reports which present data on meal numbers will of course include information on meals recorded through Bookings.

How will Local authorities access their reports?

Through their own secure online login – these reports give an overview of the Bookings activity in their schools (as well as traditional reports on meal uptake).

How do Booking cut offs and charging policies work?

These are defined during the setup of bookings as requested by you/your caterer/LA.

What control may a Caterer or LA have over their schools' payment item setup, booking cut off, charging policies etc (where applicable)?

If you are part of a Caterer or Local authority project with ParentPay, it is likely that your payment item parameters will have been setup globally for you – to reflect the Caterer or LA's requirements. The system's flexible, so if they would like to apply a separate configuration to a specific school or set of schools they can do so.

How will parents use Bookings and what will they see?

Parents will see a weekly menu to "book a day" or a weekly menu with selections. The parent either books the relevant day or selects the meal choices and are prompted to pay for the days booked when they save their changes.

If a parent does not pay for their booking in time, is their booking cancelled?

Most schools require pay on booking however those that do not should be aware that unpaid bookings will result in meals being cancelled on the day.

What happens if Javascript/active scripting is disabled in school?

Do not worry, you can still use Bookings. The page you will see will be slightly different to the screen shots included here, but you will be able to perform all the same functions.

Do parents have to have JavaScript/active scripting enabled on their computer?

Parents without JavaScript or active scripting enabled will not be able to use online bookings reliably – we recommend you encourage them to enable JavaScript or allow them to make their bookings in school on an enabled computer.

Can I switch/migrate my current Dinner money payment item in ParentPay to become a Bookings item?

Yes - you need to contact our support team for advice and guidance on this.

Will I still need to enter and maintain Meal patterns for Bookings?

No – Meal patterns are superseded by parents going online and taking control of their own bookings – so for any Bookings service, meal patterns **MUST NOT** be used.

ParentPay Data Capture™

What is ParentPay's role?

ParentPay Data Capture™ is an innovative extension to ParentPay Dinner Money™ – our dinner money collection and administration solution for schools and caterers.

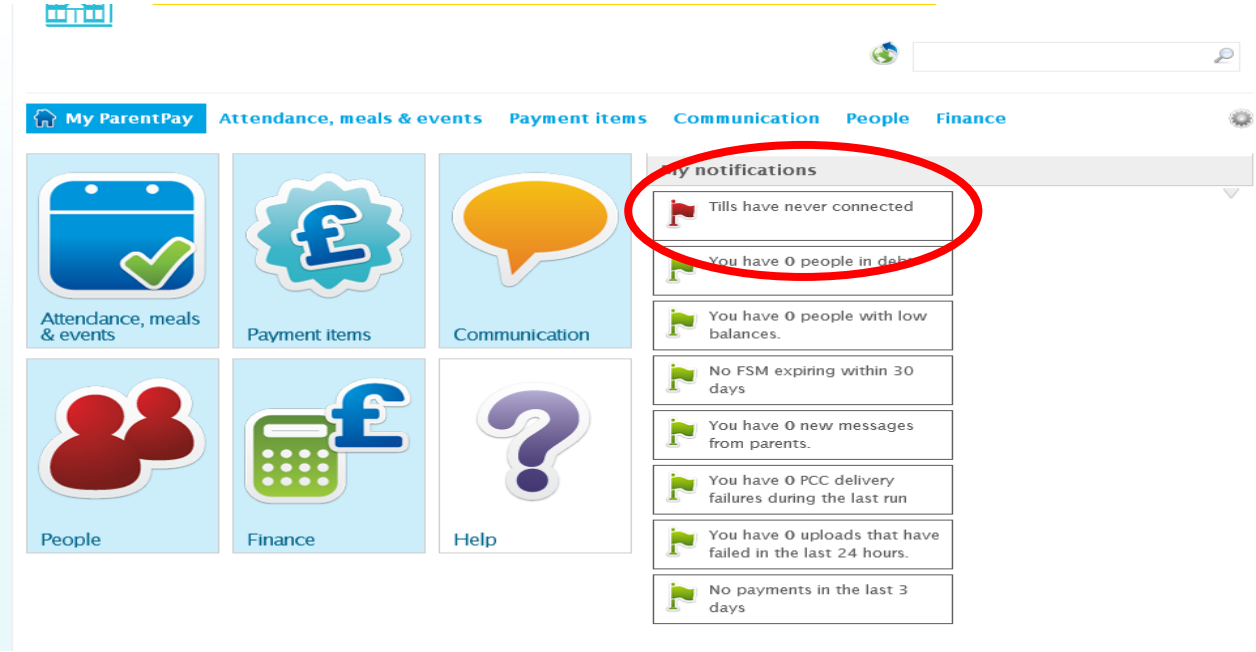
ParentPay Data Capture™ provides a fully integrated solution with cashless catering till systems in school canteens, allowing payment data to be downloaded to the till systems from ParentPay and data from those systems to be captured and reported back to ParentPay for schools, parents and caterers to view. Data captured includes: account balances, meal numbers, meal choices and nutritional analysis.

How it works

The till system is set to poll with ParentPay at intervals throughout the day once the till system is switched on and connected to the internet to bring in payments data.
Data captured during the lunch time payment item, such as updated balance information, is reported back to ParentPay at the end of each day once the catering staff in the canteen have carried out their end of day procedure on the till system.

Quick view of till link status

ParentPay Data Capture™ schools have a Till connection section on the home page of their site.

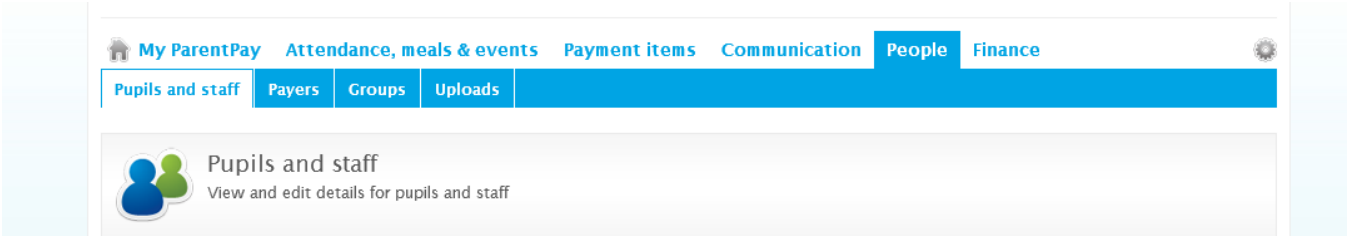


The Till connection section indicates the number of records awaiting data transfer to ParentPay from the till system.

Click on the **No Contact from tills for over** button to view a detailed report.

Checking balances

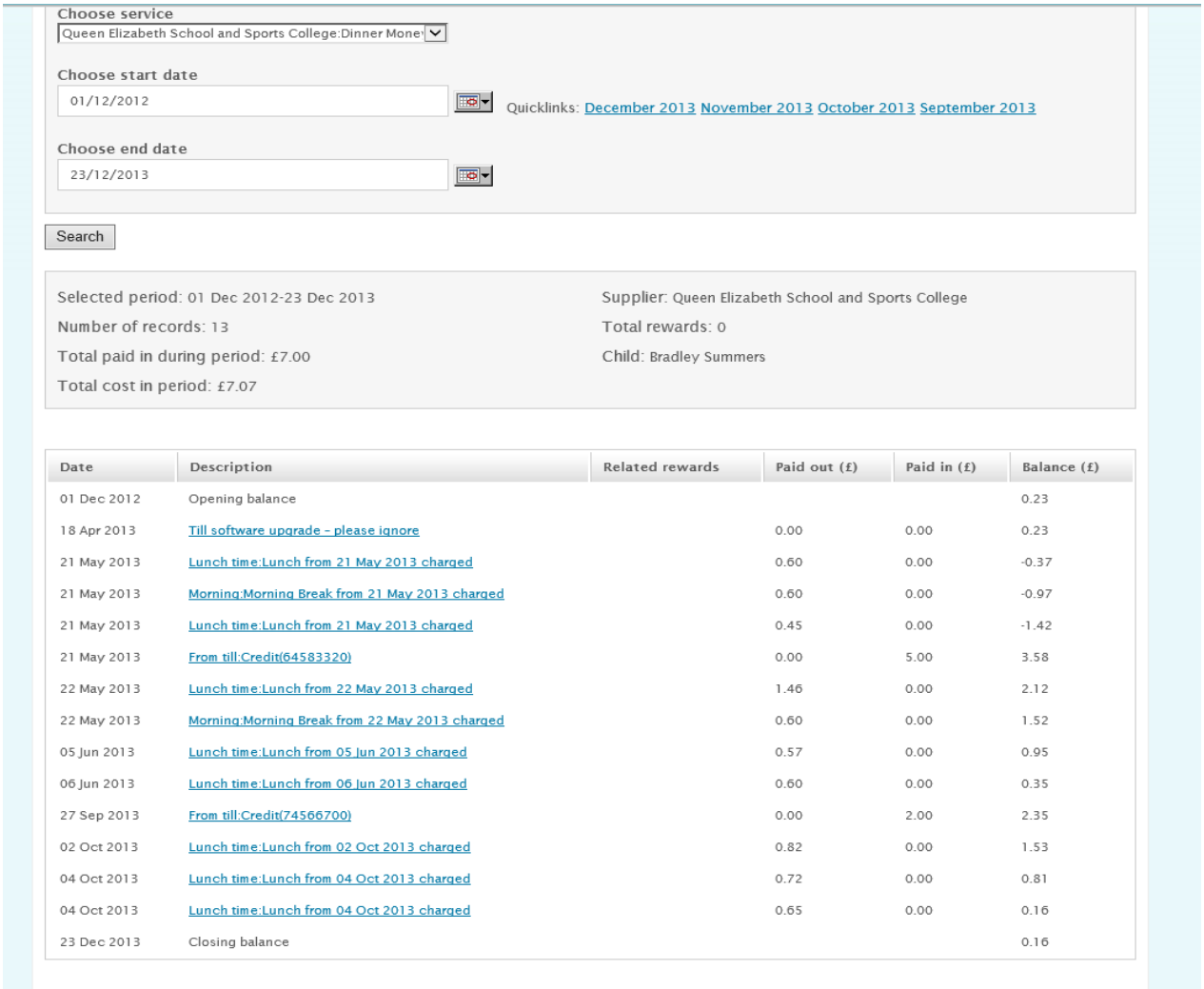
Go to **People>Pupils and staff**



- **Choose group 1:** People
- **Choose group 2:** select the year group the pupil is in
- Click **Search**

For an in depth view, locate the pupil on screen and click on the **Actions icon & View Statement** in the drop down box.

- **Choose payment item:** select the item the balance is for
- Choose your **Start and End dates** to search between
- Click **Search**

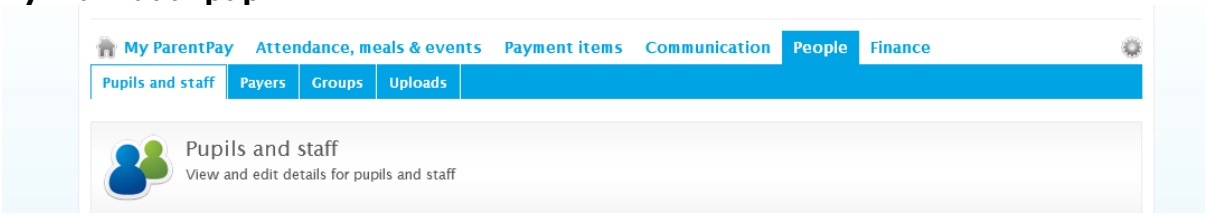

Choose service
Queen Elizabeth School and Sports College:Dinner Mone
Choose start date
01/12/2012
Quicklinks: December 2013 November 2013 October 2013 September 2013
Choose end date
23/12/2013
Search
Selected period: 01 Dec 2012-23 Dec 2013
Number of records: 13
Total paid in during period: £7.00
Total cost in period: £7.07
Supplier: Queen Elizabeth School and Sports College
Total rewards: 0
Child: Bradley Summers

Date	Description	Related rewards	Paid out (£)	Paid in (£)	Balance (£)
01 Dec 2012	Opening balance				0.23
18 Apr 2013	Till software upgrade - please ignore		0.00	0.00	0.23
21 May 2013	Lunch time:Lunch from 21 May 2013 charged		0.60	0.00	-0.37
21 May 2013	Morning:Morning Break from 21 May 2013 charged		0.60	0.00	-0.97
21 May 2013	Lunch time:Lunch from 21 May 2013 charged		0.45	0.00	-1.42
21 May 2013	From till:Credit(64583320)		0.00	5.00	3.58
22 May 2013	Lunch time:Lunch from 22 May 2013 charged		1.46	0.00	2.12
22 May 2013	Morning:Morning Break from 22 May 2013 charged		0.60	0.00	1.52
05 Jun 2013	Lunch time:Lunch from 05 Jun 2013 charged		0.57	0.00	0.95
06 Jun 2013	Lunch time:Lunch from 06 Jun 2013 charged		0.60	0.00	0.35
27 Sep 2013	From till:Credit(74566700)		0.00	2.00	2.35
02 Oct 2013	Lunch time:Lunch from 02 Oct 2013 charged		0.82	0.00	1.53
04 Oct 2013	Lunch time:Lunch from 04 Oct 2013 charged		0.72	0.00	0.81
04 Oct 2013	Lunch time:Lunch from 04 Oct 2013 charged		0.65	0.00	0.16
23 Dec 2013	Closing balance				0.16

Meal choices

This information can be accessed in two ways:

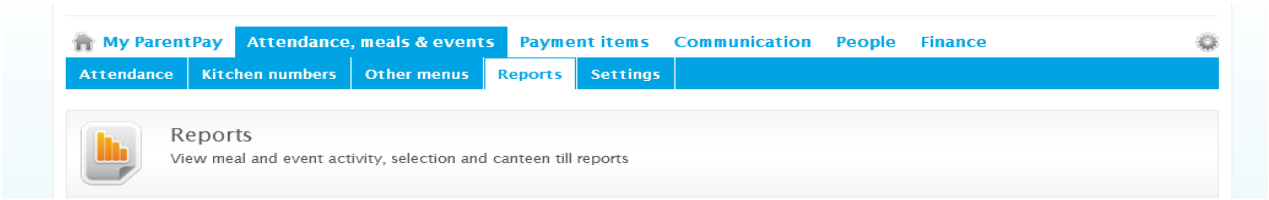
By individual pupil



- Go to **People>Pupils and staff**
- Choose group 1: Pupil
- Choose group 2: select the year group or class the pupil is in
- Click **Search**

Locate the pupil on screen and click on the **'Actions'** icon to the right hand side, in the drop down box select "view meal choices".

Across a group of pupils



- Go to **Attendance, meals & events.**
- In the menu select Meal Reports>Daily meal analysis by product (Report 15).
- Click the **blue link & show.**

Who to contact when you need support

Whilst ParentPay does not own, control or even have access to the till systems in schools, if you report an issue with balances or any other data captured from the till system to us and we are unable to assist we will forward your issue to your cashless catering till system provider for resolution.

If you believe that your balances are not updating in ParentPay there are a few things you can check before you contact ParentPay or your till provider.

Is the till system switched on and connected to the internet?
This is a common issue in schools – remember that the communication between ParentPay and the till is internet based therefore data will not transfer is the till is not switched on and connected to the internet.

What does the Till queue status section on your home page tell you?
If this section says 'Lost' then there is no connection between the till and ParentPay, check the till is on and connected to the internet. If it is then you need to contact your till provider for assistance.

Can you see an updated balance against the pupil account?
Go to Pupils>Pupils and search for the year group the pupil is in – if the balance on screen does not show today's date then there may be an issue with the links between the till and ParentPay – you need to contact your till provider for assistance.

Can you see payments made in ParentPay?
If the answer is yes, it is likely there is an issue with the link between ParentPay and the till system and it is best to contact your till supplier in the first instance.

ParentPay's support team is always on hand to help even if the issue is something that is outside our control.

Reporting

ParentPay generates reports both live on screen or in a file that opens in Excel. Below is a list of the key fields that can be reported on:

Payment Item	Fixed, variable, repeatable, etc
Payment Item ID	A unique ID for the Item for payment
Payment Item name	The name you called this payment item – it is important to name it well
Payment ID	ParentPay's own payment ID (PID)
Group key	Code given to each item if the payer has paid for multiple items in the transaction field, for PayPoint transactions the word PayPoint will appear
Auth code	Authorisation code from card issuer
In favour of (ID)	Pupil ID usually admission/role number
Forename	Forename
Surname	Surname
Year	Year
Reg. group	Reg. Group
Notes	Text payer has supplied for further information
Comment	Comments you have typed in the comments section
Quantity	Number of items requested
Payer consent	C if consent was given
Amount	Amount paid
Due amount	Amount requested
Settled amount	Amount processed to the bank
Paid date	Date and time the actual transaction took place
Processed date	Date payment request enters banking system
Bank account	Name of the bank account payments are settled to
Payee	Name of the organisation that owns the bank account payments are settled to
Means	Card type, PayPoint, Cash, Cheque
Group codes 1-3	Your own defined identification codes
Management codes 1-3	

Authorised v Processed transactions

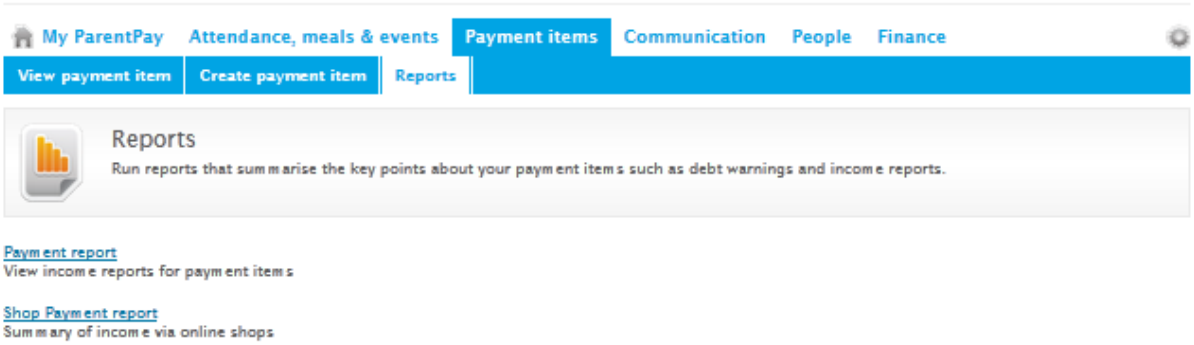
Authorised: The bank has allowed the payment to be accepted, the time/date recorded for this transaction will coincide with the time the parent made the payment

Processed: After midnight all Authorised payments are sent to the banking system to be settled. This time/date does not coincide with the time the transaction took place. All payments (provided there are no problems) in a processed batch will arrive in your bank about 3/4 days later, this will vary from bank to bank.

Payment reports

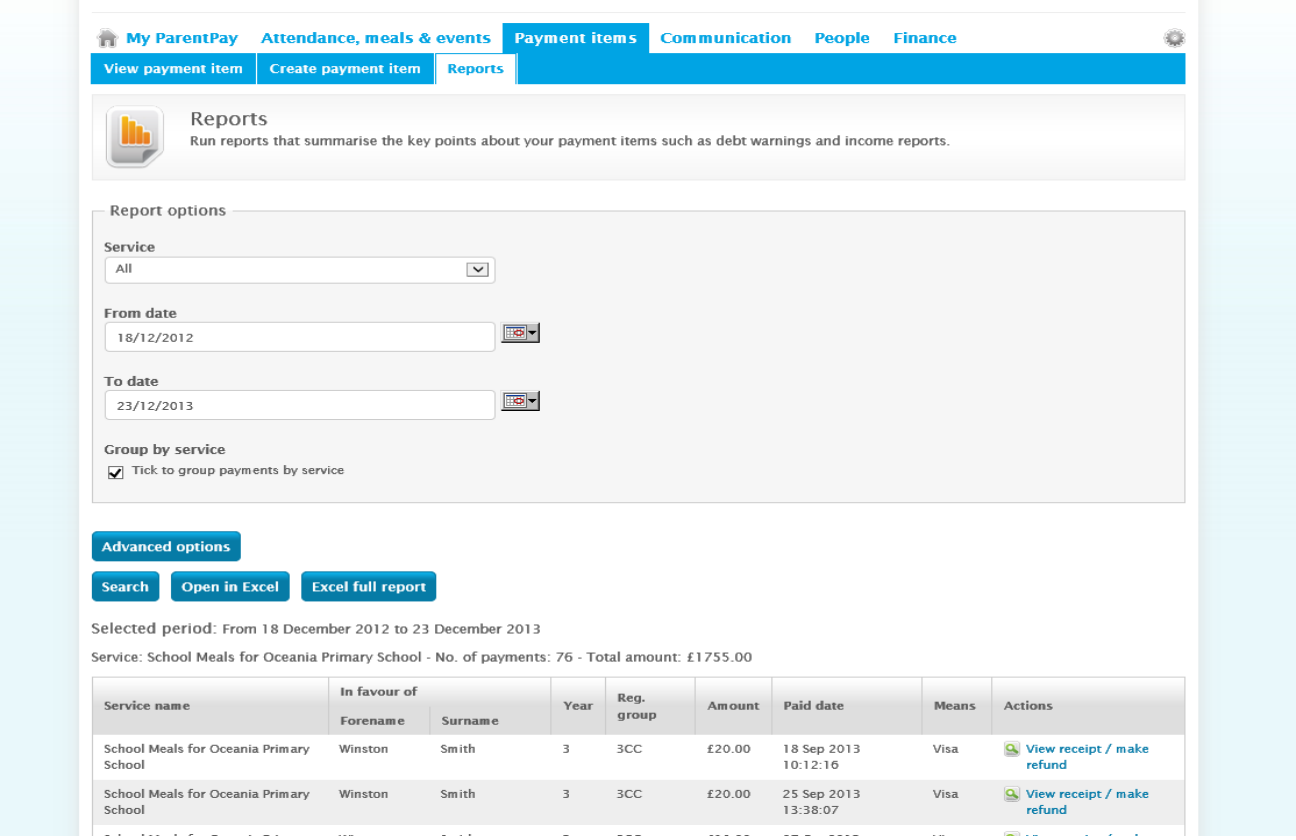
Quick view of payments received across all payment items

Click on **Payment items>Reports** and select **Payment report**



A list of payment items and total amount paid in the recent period/dates as selected by you will appear on screen.

For a more in depth view of a payment for a particular payment item, click on **View receipt/ make refund** in the Actions column on the right side of the screen.

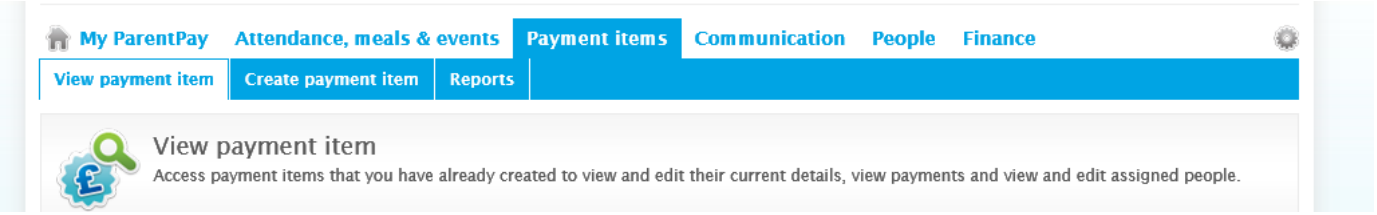


Specify a date range and click **Search**.

To tailor the information you require for your payment report click on the **Advanced options button** and tick the boxes alongside the information required.

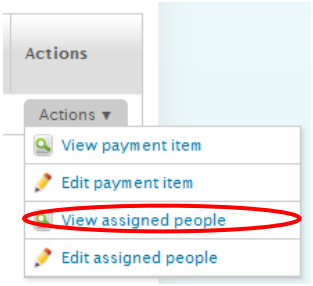
Payments by individual for a particular payment item

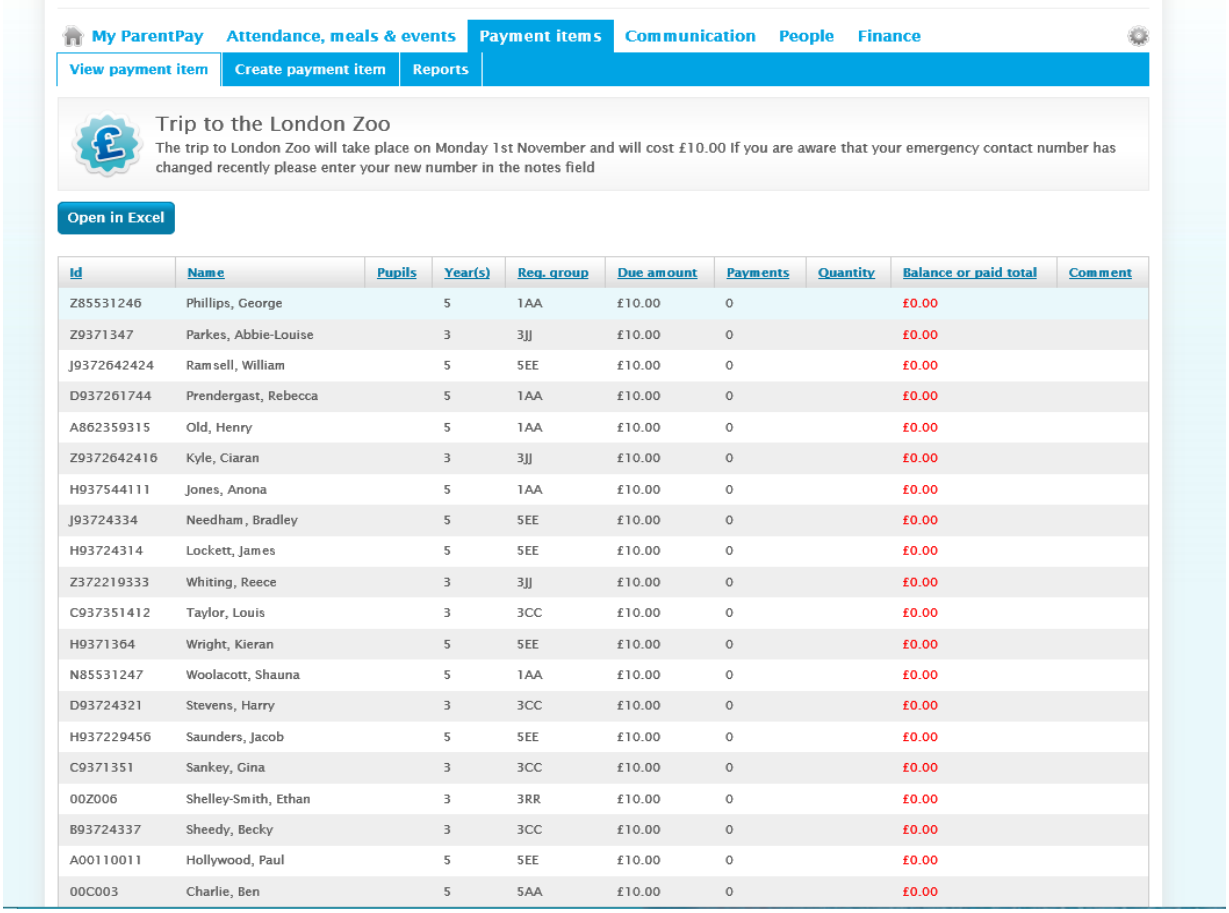
Go to **Payment Items>View Payment Item**


My ParentPay
Attendance, meals & events
Payment items
Communication
People
Finance
View payment item
Create payment item
Reports
View payment item
Access payment items that you have already created to view and edit their current details, view payments and view and edit assigned people.

Click to **see all live payment items.**

Locate your item on screen and click **Actions > View assigned people**.

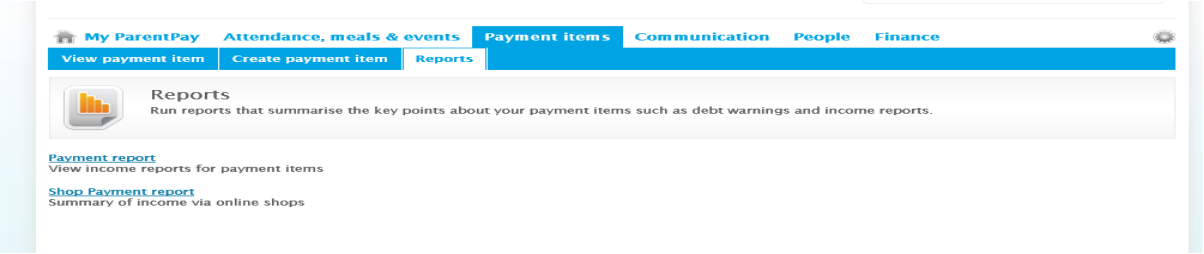



My ParentPay
Attendance, meals & events
Payment items
Communication
People
Finance
View payment item
Create payment item
Reports
Trip to the London Zoo
The trip to London Zoo will take place on Monday 1st November and will cost £10.00 If you are aware that your emergency contact number has changed recently please enter your new number in the notes field
Open in Excel

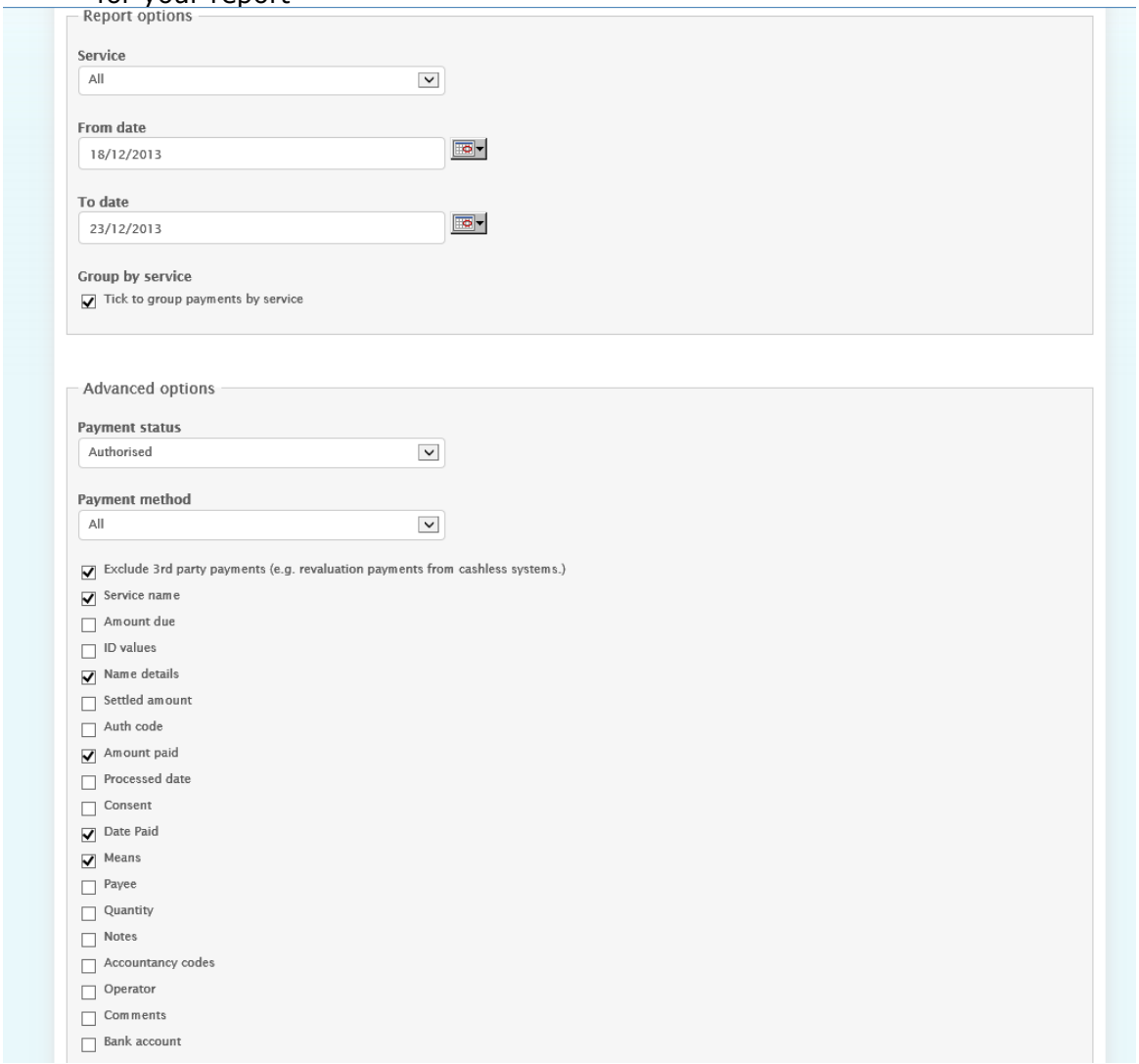
Id	Name	Pupils	Year(s)	Reg. group	Due amount	Payments	Quantity	Balance or paid total	Comment
Z85531246	Phillips, George		5	1AA	£10.00	0		£0.00	
Z9371347	Parkes, Abbie-Louise		3	3JJ	£10.00	0		£0.00	
J9372642424	Ramsell, William		5	5EE	£10.00	0		£0.00	
D937261744	Prendergast, Rebecca		5	1AA	£10.00	0		£0.00	
A862359315	Old, Henry		5	1AA	£10.00	0		£0.00	
Z9372642416	Kyle, Ciaran		3	3JJ	£10.00	0		£0.00	
H937544111	Jones, Anona		5	1AA	£10.00	0		£0.00	
J93724334	Needham, Bradley		5	5EE	£10.00	0		£0.00	
H93724314	Lockett, James		5	5EE	£10.00	0		£0.00	
Z372219333	Whiting, Reece		3	3JJ	£10.00	0		£0.00	
C937351412	Taylor, Louis		3	3CC	£10.00	0		£0.00	
H9371364	Wright, Kieran		5	5EE	£10.00	0		£0.00	
N85531247	Woolacott, Shauna		5	1AA	£10.00	0		£0.00	
D93724321	Stevens, Harry		3	3CC	£10.00	0		£0.00	
H937229456	Saunders, Jacob		5	5EE	£10.00	0		£0.00	
C9371351	Sankey, Gina		3	3CC	£10.00	0		£0.00	
00Z006	Shelley-Smith, Ethan		3	3RR	£10.00	0		£0.00	
B93724337	Sheedy, Becky		3	3CC	£10.00	0		£0.00	
A00110011	Hollywood, Paul		5	5EE	£10.00	0		£0.00	
00C003	Charlie, Ben		5	5AA	£10.00	0		£0.00	

In depth payment reporting

Click on **Reports>Payments**



- **Payment Item:** select the Payment you want to report on
- **From and to dates:** select the dates you want a report for
- **Payment status:** authorised or processed
- **Payment method:** select the payment method or All
- **Click on Advanced options:** tick the boxes to include the information you need for your report



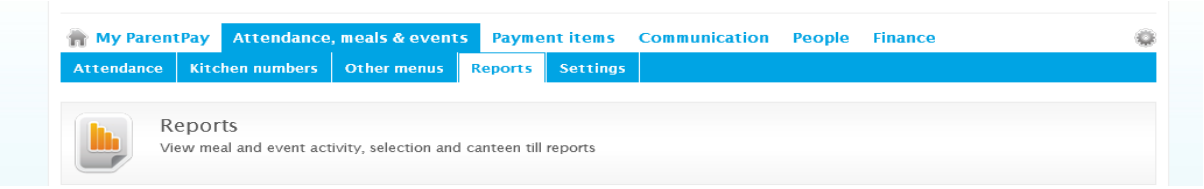
- Click **Search/Open in Excel**

Your payment report will be displayed

School meal reporting

There are lots of school meal related reports, not all schools will be able to access all reports – access is based on the ParentPay modules you are using.

All reports are accessed via the **Attendance, meals & events** tab in ParentPay.



The most popular reports are as follows:

Meal Numbers

Cost and non-cost report for individual pupils

- **Meal Number Reports**: Report 03 : individual meal numbers
- Click **the blue link.**

FSM entitlement

Entitlements by pupil within dates selected

- **Choose FSM report**: Report 07 – FSM entitlement
- Click **the blue link.**

FSM uptake

Breakdown of total pupils entitled and pupils using the entitlement in percentages

- **Choose FSM report**: Report 12 – FSM uptake
- Click **the blue link.**

Summary returns

Breakdown of meal numbers, value of those meals and method of payment.

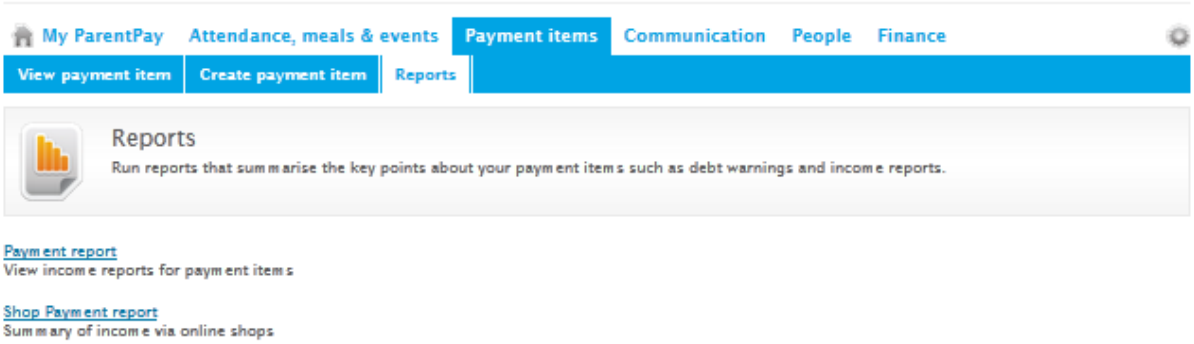
- **Choose Summary report**: Report 05: Summary return general
- Click **the blue link.**

ParentPay and your finance package

Providing your finance package can accept Excel files for import, you can use the payment data reports in ParentPay to populate your finance package.
We recommend you contact your provider for instructions on how to import the payment data to their software.

Export payment data from ParentPay

Click on **Payment items>Reports** and select **Payment report**



- **Payment Item:** select the payment item you want to report on
- **From and to dates:** select the dates you want a report for
- **Payment status:** processed
- **Payment method:** select the payment method or leave as All
- **Click on Advanced options:** tick the boxes to include the information you need for your report
- Click **Search/Open in Excel**

NB: PFM schools wishing to export a payment report for import to PFM should click on '**Excel full report'.**

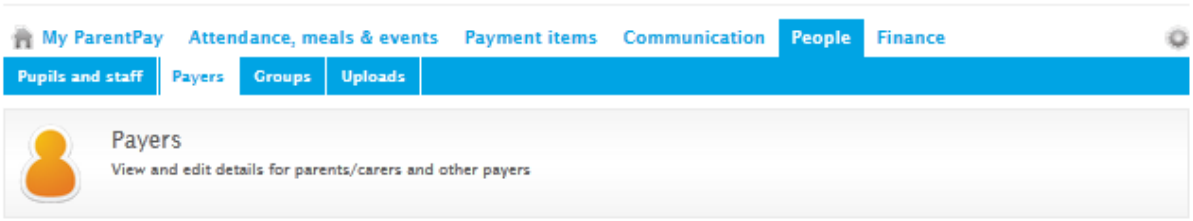
Save the Excel report into the relevant folder for your Finance system and import the saved report from the folder into your system.

Parent accounts

Usernames and passwords

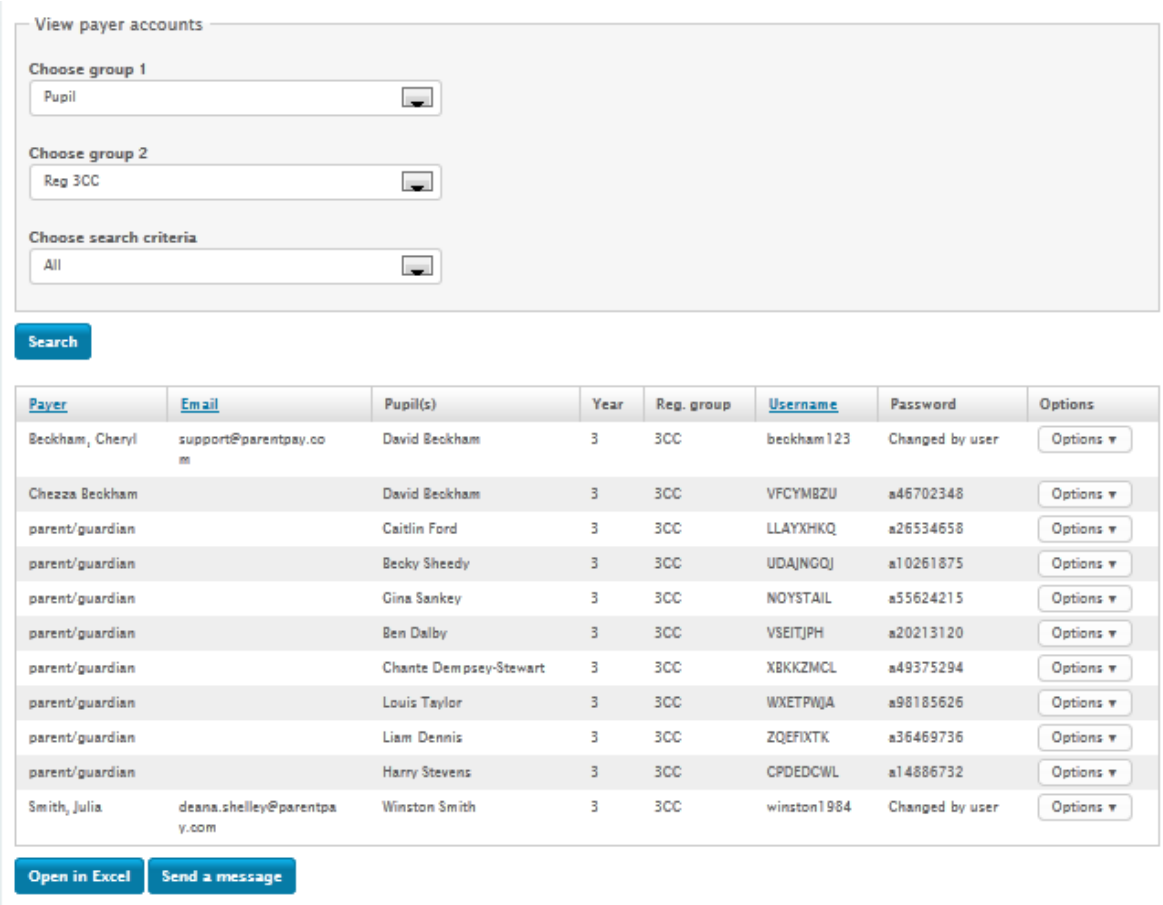
Activation codes are automatically generated for each payer when you upload your pupil data. Once parents have activated their accounts they may, at times, need a reminder of their user details or a password reset.

Go to **People>Payers**



- Choose group 1: **Pupil**
- Choose group 2: select the year group of the payer's child using the drop down menu, alternatively select **All**
- Click **Search**.

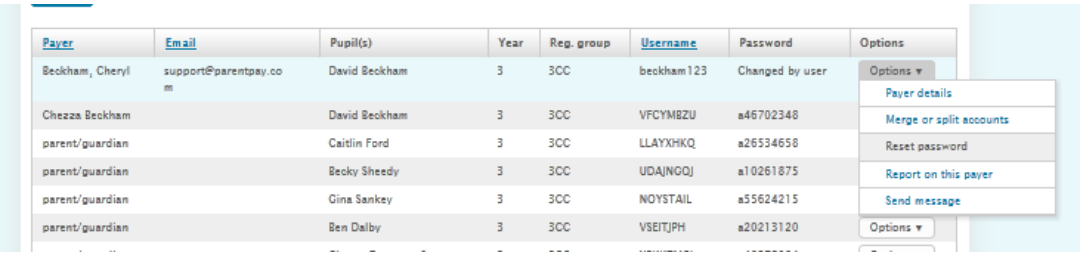
A list of the pupils with their allocated payers will appear, locate the payer.



If a payer has NEVER activated their ParentPay account you will be able to see their Username and Password activation codes in the relevant columns on the screen.
If a payer has activated their account you will be able to see their Username but their Password will show as 'Changed by user'.

Resetting passwords

If a payer has forgotten their password and in ParentPay it is showing as 'Changed by user' you can reset their password by clicking on the drop down menu next to the payer and selecting **Reset password**.



The new password will be emailed to the payer.

In the event that the payer has not entered an email address in ParentPay you will be notified of this on-screen and the new password will be visible for you to notify the payer by phone as well as generate a password reminder letter/email/SMS.

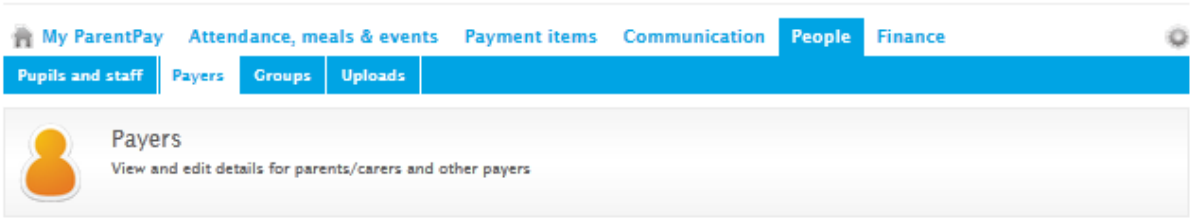
Adding children to an account

Where payers have more than one child at a ParentPay school (even multiple ParentPay schools) it is possible to combine the accounts to create one set of login details for all children.

Whilst schools are able to do this, ParentPay recommend that parents add the children themselves by clicking on 'Add a child' from the home page of their account. If parents do this themselves they need to activate one of their children's accounts then merge the other children to that account using the activation codes provided to them.

Parents do not need to activate any of their accounts for the school to merge accounts for them.

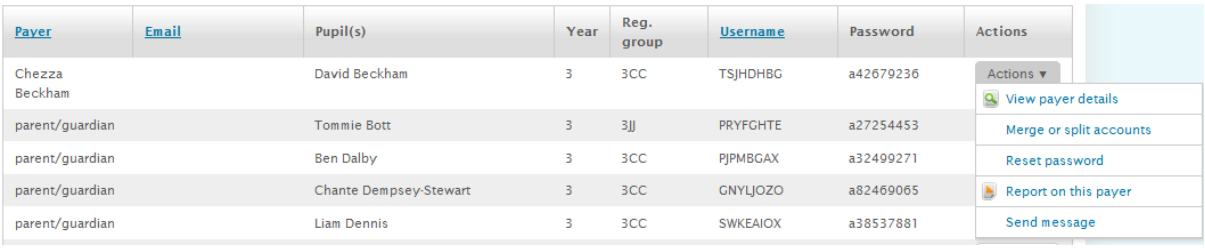
Go to **People>Payers**



- Choose group 1: **Pupil**
- Choose group 2: select the year group of the payer's child using the drop down menu, alternatively select **All**
- Click **Search**.

A list of the pupils with their allocated payers will appear, locate the payer.

Click on the drop down menu and select the **Merge or split accounts** action

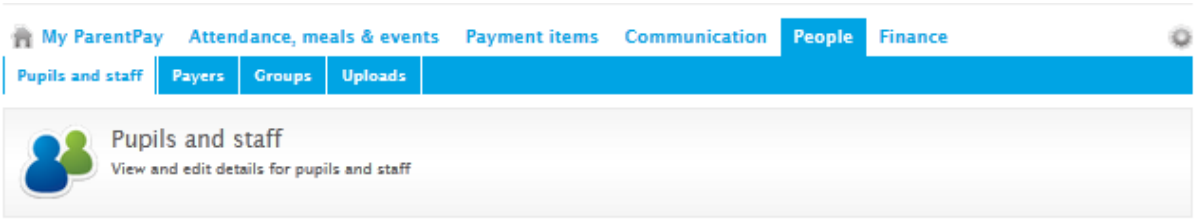


- Click on **Merge accounts**
- Type in the surname of the pupil to merge to the account
- Click **Search**
- Tick the radial box alongside the child to merge to the account
- Click **Save**

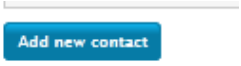
Create second payer account for a child

Recognising that families can change, ParentPay gives schools the ability to create a second payer account for a child. Both parents/guardians are then able to make payments for the child.

Click on **People>Pupils and staff**



- **Choose group 1:** Pupil
- **Choose group 2:** Use the drop down to select the year group/class the child is in
- Click **Search**
- Locate the child and select **Edit pupil details** from the drop down menu
- Click on **Add new contact**



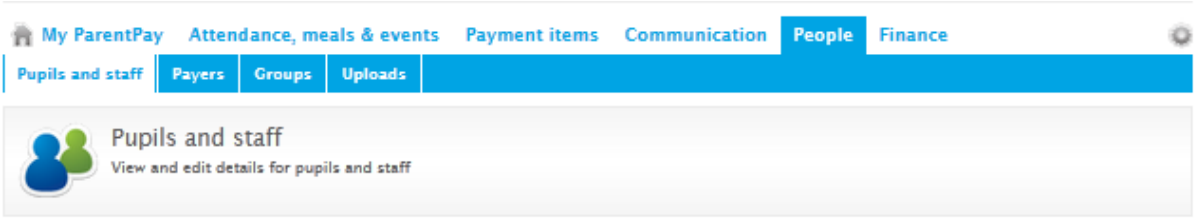
- **Complete** the Title, Forename, Surname and Email address fields
- Type in a **Username** (usernames need to be unique and you will be notified if the username has already been taken)
- Type a password into the **New password** field and type it again in the **Confirm password** field (password must be at least 6 characters long and include at least one number)
- Click **Save**
- Click **OK**

You can now generate an activation letter/email for the payer (see the ParentPay Communication Centre™ section of this guide for instructions) or advise the second payer of their username and password by phone. They will be prompted to change the login details when they activate the account.

Editing a payers contact details

Schools are able to edit a payers contact details however ParentPay recommend that the payer do this themselves via the Profile tab of their ParentPay account.

Click on **People>Pupils and staff**



- **Choose group 1:** Pupil
- **Choose group 2:** Use the drop down to select the year group/class the child is in
- Click **Search**
- Locate the child and select **Edit pupil details** from the drop down menu
- Edit the details as appropriate and click **Save**.

Supporting your parents

This section covers all aspects of how your parents use ParentPay and is a great reference for you when they have a query.

How parents activate their account

1. Go to www.parentpay.com
2. Type in the **username and password** received in the letter from school, be careful when typing in UPPER and lower case letters, also be sure not to confuse the letter l (for lemon) with the number one (1) and the number 0 (zero) with the letter o (for orange). **NB these user details are for one-time use only and will become invalid after account activation**
3. Follow the on-screen instructions to successfully activate the account
4. Read the ParentPay terms and conditions and click in the box next to **Accept terms and conditions** at the bottom of the page and click **Continue**

They will see an overview of their activation onscreen and will receive an email confirming their account settings click **Continue**
The account is now activated and they are ready to start making payments.

In order to ensure they can receive password reset emails, payment receipts and any email/SMS alerts that they may wish to request please ask them to ensure they verify their email address by following the on screen prompts.

Cross-school login

In addition to a new look and feel one of the key features we have introduced is "cross-school login" enabling parents with children at different schools to add up to six children to their account regardless of which school their children attend, providing those schools subscribe to ParentPay.

Existing parent user – Add a child

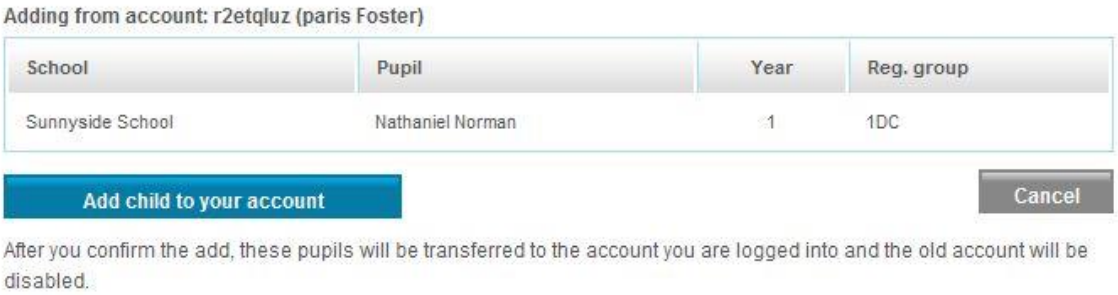
IMPORTANT: the parent must log out of all their ParentPay accounts before proceeding.

They need to choose one account to 'add' the rest of their children to; the username and password for this account will become their 'main' account login details.

- Go to www.parentpay.com
- Login to the account they wish to have as their future login for all children/schools
- Click on the **Add a child** tab on their home page

- **Enter the username and password** for the child they wish to add.
- Click **Search**.

- The school, pupil name, year group and class will show on screen.



- Click **Add child to your account** to confirm this is the child they wish to add to their account

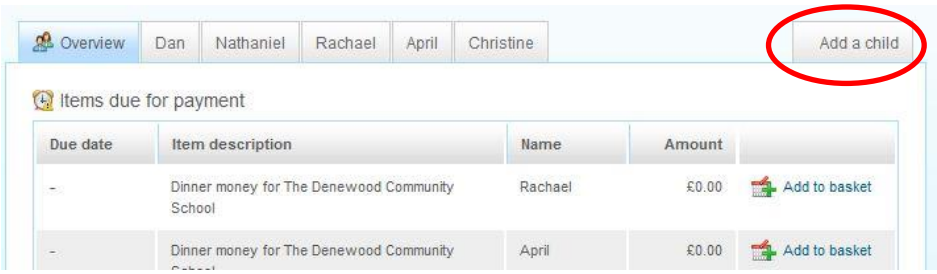
They can repeat the above process to add a maximum of six children to their account.

New parent user – Add a child

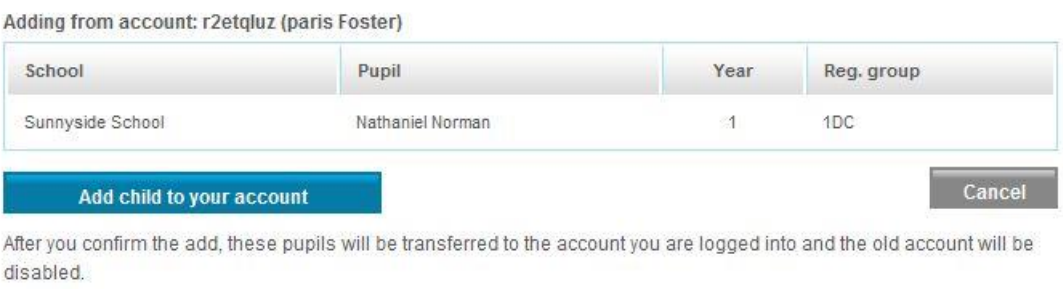
If they have more than one child at the same school or children at different schools that use ParentPay and have been provided with a username and password for those children they should choose one child's activation username and password to activate their account.

This account will then become their 'main' account (login) for all their children.

- Go to www.parentpay.com
- **Enter the username and password** they have received for one of their children in the Account login area
- Click **Activate**
- Click on the **Add a child** tab on their home page



- **Enter the username and password** for the child they want to add
- Click **Search**
- The school, pupil name, year group and class will show on screen



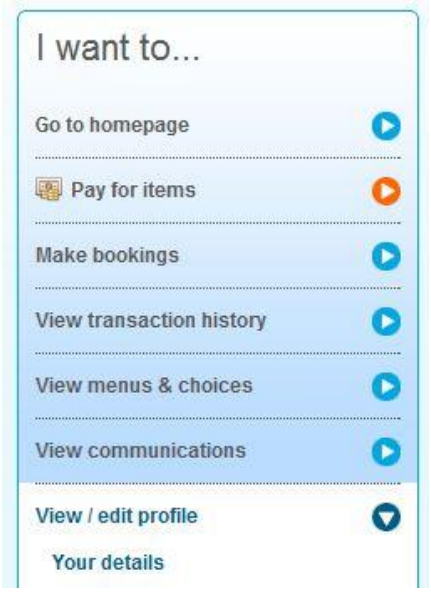
- Click **Add child to your account** to confirm this is the child they wish to add to their account

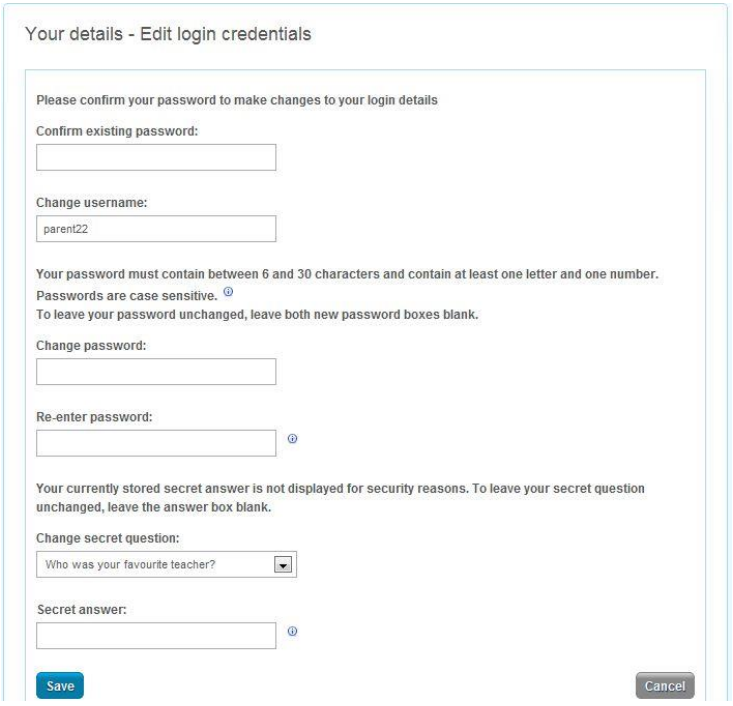
They can repeat the above process to add more children to their account up to a maximum of six.

Changing their username and/or password

If at any time they want/need to change their username or password they can do so as follows:

Go to the **'I want to...'** area of their home page **View/edit profile>Your details**




Your details - Edit login credentials
Please confirm your password to make changes to your login details
Confirm existing password:
Change username:
parent22
Your password must contain between 6 and 30 characters and contain at least one letter and one number.
Passwords are case sensitive.
To leave your password unchanged, leave both new password boxes blank.
Change password:
Re-enter password:
Your currently stored secret answer is not displayed for security reasons. To leave your secret question unchanged, leave the answer box blank.
Change secret question:
Who was your favourite teacher?
Secret answer:
Save
Cancel

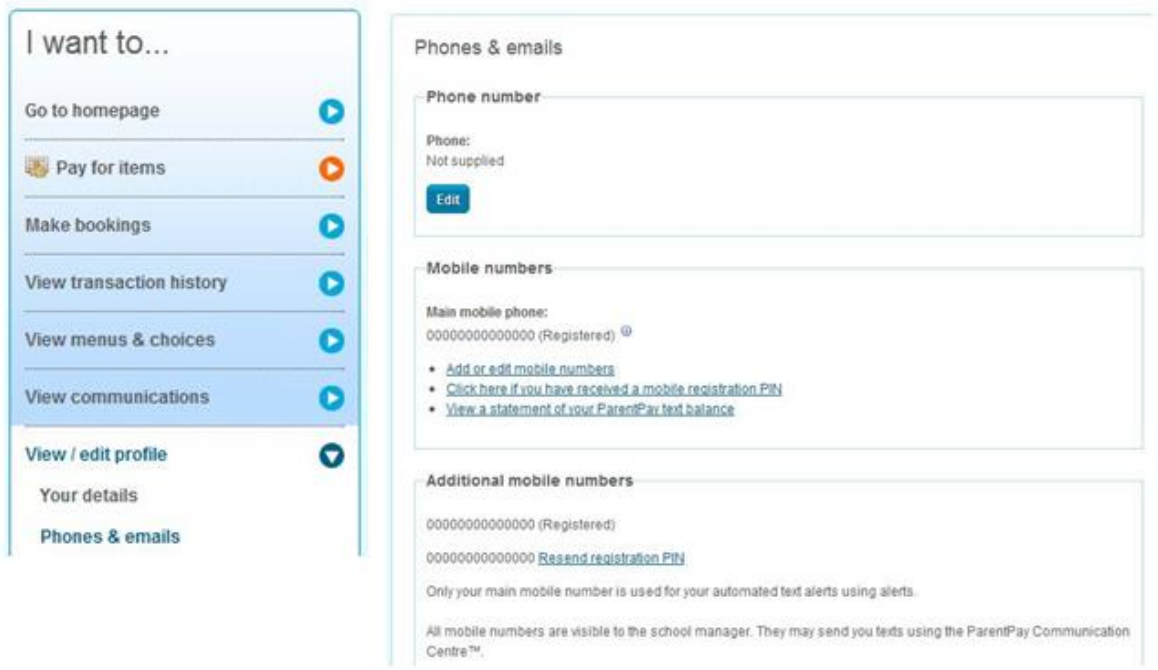
First, they will need to confirm their existing password – then they can make any changes required and click **Save**.

Managing phone numbers and email addresses

Providing their mobile number in ParentPay not only allows school/s to send them SMS text message communications but also allows them to opt in to receiving our automated SMS text alerts for items such as a low dinner money balance for their child/each of their children.
Automated text message alerts that they request are payable by them at 0.06p per message sent.
Text messages sent to them by their child's school are at NO charge to the parent.

Entering mobile numbers and email addresses

Go to the **'I want to…'** area of their home page **View/edit profile>Phones & Emails**


I want to...
Go to homepage
Pay for items
Make bookings
View transaction history
View menus & choices
View communications
View / edit profile
Your details
Phones & emails
Phones & emails
Phone number
Phone:
Not supplied
Edit
Mobile numbers
Main mobile phone:
00000000000000 (Registered)
Add or edit mobile numbers
Click here if you have received a mobile registration PIN
View a statement of your ParentPay text balance
Additional mobile numbers
00000000000000 (Registered)
00000000000000 Resend registration PIN
Only your main mobile number is used for your automated text alerts using alerts.
All mobile numbers are visible to the school manager. They may send you texts using the ParentPay Communication Centre™.

- **Phone number**: home, office or other number
- **Mobile numbers**: this area contains their **'main mobile number'** – this will be the number the school uses to send them SMS text messages and will also be the mobile number that any automated alerts they request are sent to.

When they provide their mobile number they will automatically receive a registration PIN in order to 'register' their mobile – If they do not 'register' their mobile they will be unable to receive automated SMS text alerts from ParentPay.

They do not need to 'register' their mobile number in order for their child/childrens school to send them SMS text messages.

Three easy steps to enable automated SMS text alerts

Step 1: Registering your mobile number
If they wish to subscribe to our automated SMS text alerts and have received their registration PIN, they must log back into their ParentPay account, go to the **'I want to…'** area **View/edit profile>Phones & emails** and click on the Click here if you have received a mobile registration PIN link to register their mobile. The registration PIN is valid for 7 days.

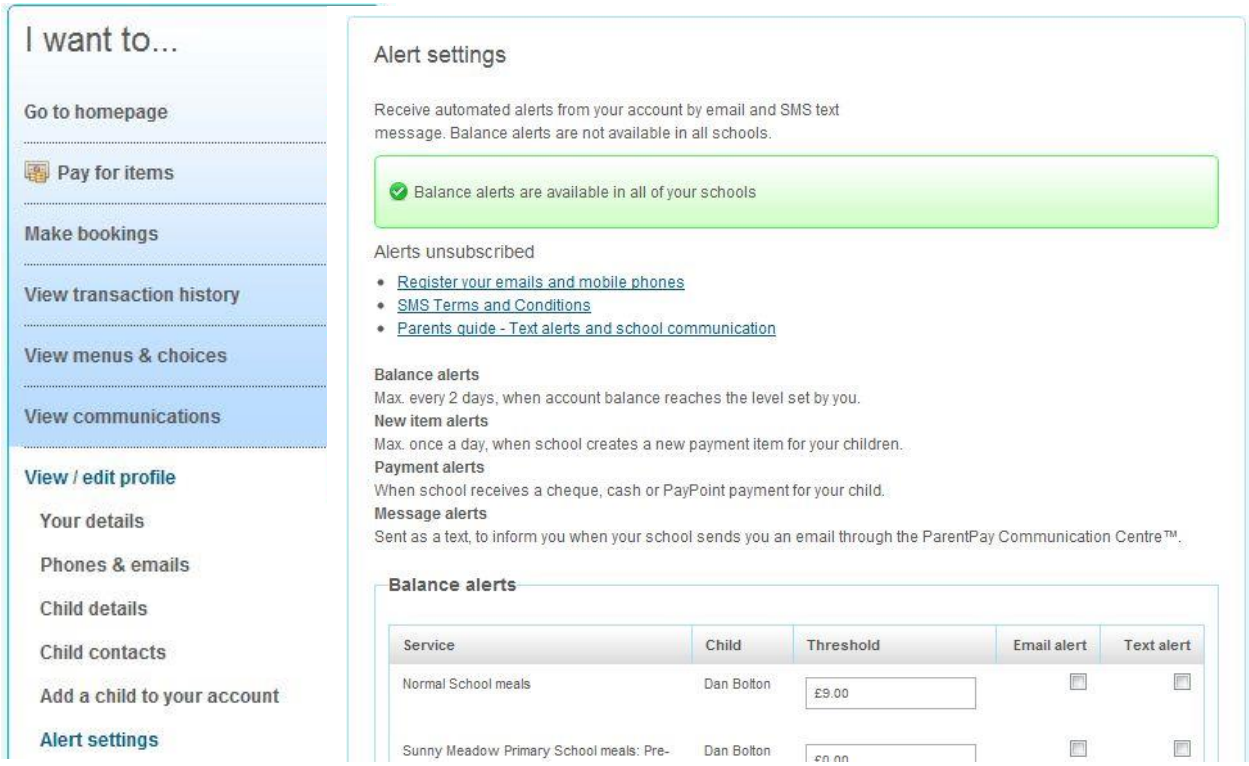
Step 2: Top up your SMS text balance
Automated SMS text alerts that they request are paid for by them at a charge of 0.06p per message sent – as such they must ensure that they maintain a SMS text balance of at least £2.40.

Topping up is easy, they simply go to **Pay for items** via **the 'I want to…'** area of their home page and click on the **'Other'** tab.

Step 3: Choosing the alerts you want to receive
Go to the **'I want to…'** area of the home page **View/edit profile>Alert settings**
Choose which alerts they wish to receive for their child/each of their children and set the threshold (balance) at which they wish to receive alerts. For more guidance please see our 'Alert settings' area later in this guide.

- **Additional mobile numbers**: parents are able to provide more than one mobile number to enable the school to send them text messages – schools can choose to 'send to all mobile numbers' in the event of an emergency.
- **Email addresses**: it is likely that they provided an email address and verified it during the activation of their ParentPay account and this will show as their 'main email address' – they are able to provide an alternative email address if they wish.
- **Preferred communication channel**: they can indicate which method they wish their school to use when contacting them for urgent and normal communications – the school can disregard these settings if they choose.

Alert settings


I want to...
Go to homepage
Pay for items
Make bookings
View transaction history
View menus & choices
View communications
View / edit profile
Your details
Phones & emails
Child details
Child contacts
Add a child to your account
Alert settings
Alert settings
Receive automated alerts from your account by email and SMS text message. Balance alerts are not available in all schools.
Balance alerts are available in all of your schools
Alerts unsubscribed
Register your emails and mobile phones
SMS Terms and Conditions
Parents guide - Text alerts and school communication
Balance alerts
Max. every 2 days, when account balance reaches the level set by you.
New item alerts
Max. once a day, when school creates a new payment item for your children.
Payment alerts
When school receives a cheque, cash or PayPoint payment for your child.
Message alerts
Sent as a text, to inform you when your school sends you an email through the ParentPay Communication Centre™.
Balance alerts
Service
Child
Threshold
Email alert
Text alert
Normal School meals
Dan Bolton
£9.00
Sunny Meadow Primary School meals: Pre-
Dan Bolton

Go to the **'I want to…'** area of the home page **View/edit profile>Alert settings**
The 'Alert settings' screen will confirm if they are able to set 'balance' alerts for all of their children – this feature is not available to all schools and is dependent on the type of subscription they have with ParentPay. In the event that parents are not able to set automated low balance SMS alerts, a list of the children they are unable to do this for will show on screen.

Balance alerts: they simply choose the type of alert they wish to receive (Email or SMS text) and set the 'Threshold' for each child. We recommend that this is set to cover the cost of meals for 3 days in order that parents have time to top-up before their child may be refused a meal.

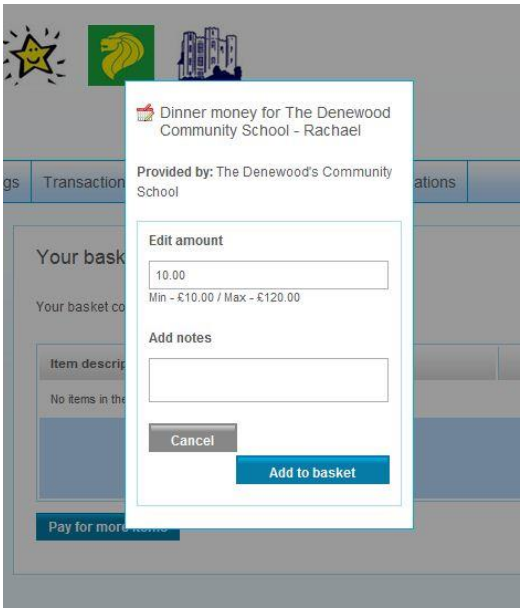
New item alerts: they can choose to receive an alert when their child's school sets up a new payment item for their child

Payment alerts – cheques and cash: parents can set up alerts to tell them when a cash/cheque payment has been recorded against their child's account in school ensuring they know the payment has been received safely.

Payment alerts – PayPoint: in the event that they are a cash based payer and are using either a PayPoint card for school meal top ups and/or barcoded letters to pay for trips , they are able to set alerts to notify them once the payment shows in their child's account in school.

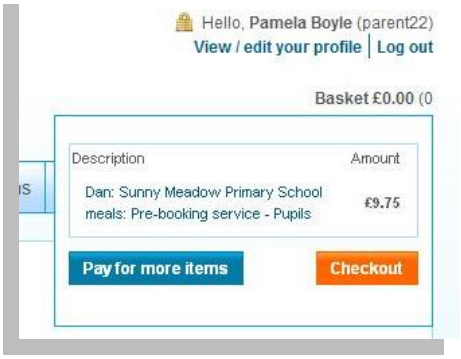
Message alerts: a great way to know that their school has sent them a message in ParentPay.

Using their basket: quick add items



Parents can now pay for all their children in one easy place with our quick add basket! The **'Overview tab'** on their home page shows items due for payment across all of their children.
Locate the item they'd like to pay for and click on **Add to basket.**
Edit the **'Amount'** to pay and provide any **'Notes'** if appropriate in the pop-up window.

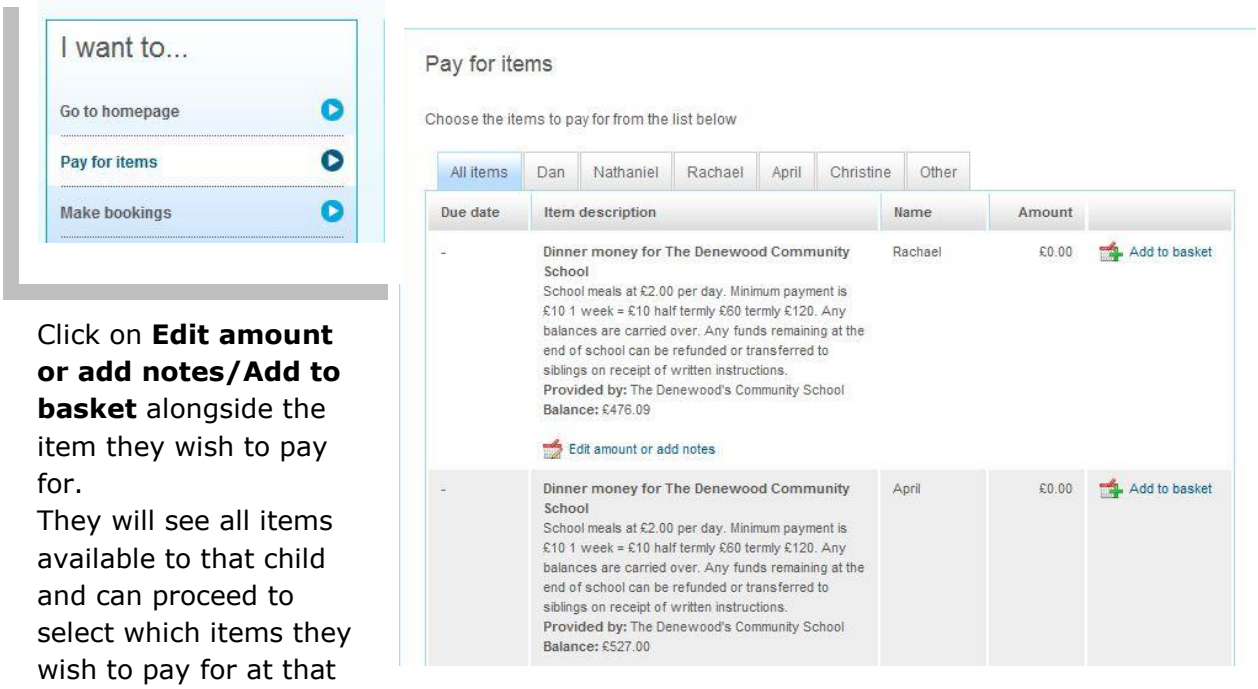
Click **Add to basket** and keep repeating the process until they are ready to **'Checkout'**.



View and pay across all children

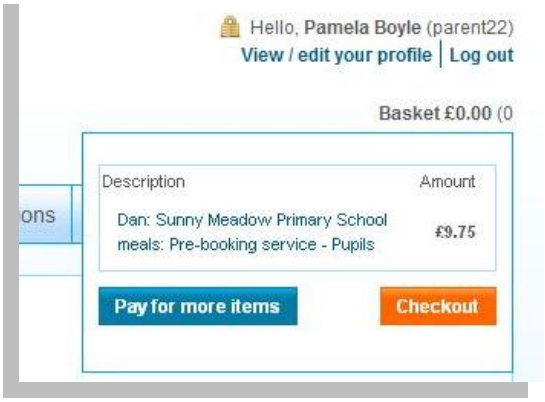
Go to **Pay for items** in the **'I want to...'** area on the left of their screen.

The screen will default to the **'All items'** tab displaying each item available by child with a full Description of the item, Due date and Amount.


I want to...
Go to homepage
Pay for items
Make bookings
Pay for items
Choose the items to pay for from the list below
All items
Dan
Nathaniel
Rachael
April
Christine
Other
Due date
Item description
Name
Amount
Dinner money for The Denewood Community School
School meals at £2.00 per day. Minimum payment is £10 1 week = £10 half termly £60 termly £120. Any balances are carried over. Any funds remaining at the end of school can be refunded or transferred to siblings on receipt of written instructions.
Provided by: The Denewood's Community School
Balance: £476.09
Rachael
£0.00
Add to basket
Edit amount or add notes
Dinner money for The Denewood Community School
School meals at £2.00 per day. Minimum payment is £10 1 week = £10 half termly £60 termly £120. Any balances are carried over. Any funds remaining at the end of school can be refunded or transferred to siblings on receipt of written instructions.
Provided by: The Denewood's Community School
Balance: £527.00
April
£0.00
Add to basket

Click on **Edit amount or add notes/Add to basket** alongside the item they wish to pay for.
They will see all items available to that child and can proceed to select which items they wish to pay for at that time by clicking **Edit amount or add notes/Add to basket.**

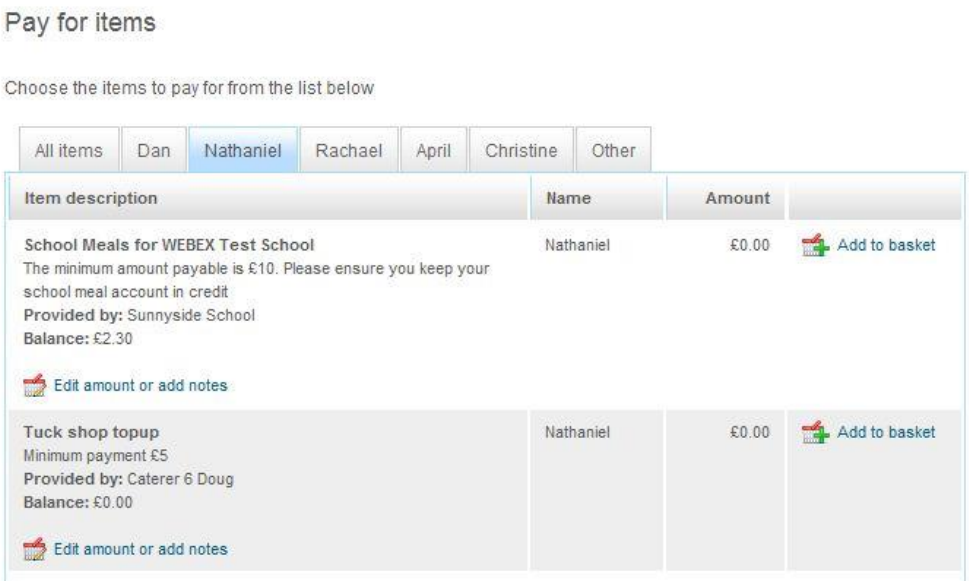
Each time they add an item to their basket, they will be directed to the top right of the screen and a preview of their 'Basket' will pop up.
Once ready to make payment go to their 'Basket' and click **Checkout.**



They will have the opportunity to review their purchases, remove any they did not intend to make or edit those they did before proceeding to make their payment as normal by clicking **Pay securely now**.

View and pay by child

Go to **Pay for items** in the **'I want to...'** area on the left of their screen. Click on the child's name tab.

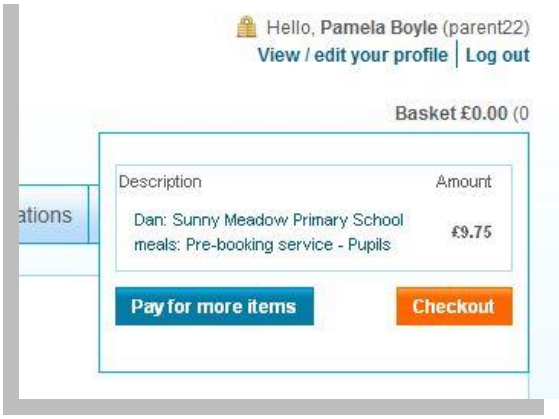


They will see all items available to that child and can proceed to select which items they wish to pay for at that time by clicking **Edit amount or add notes/Add to basket.**

Each time they add an item to their basket, they will be directed to the top right of the screen and a preview of their 'Basket' will pop up.

Once ready to make payment go to their 'Basket' and click **Checkout.**

They will have the opportunity to review their purchases, remove any they did not intend to make or edit those they did before proceeding to make their payment as normal by clicking **Pay securely now**.

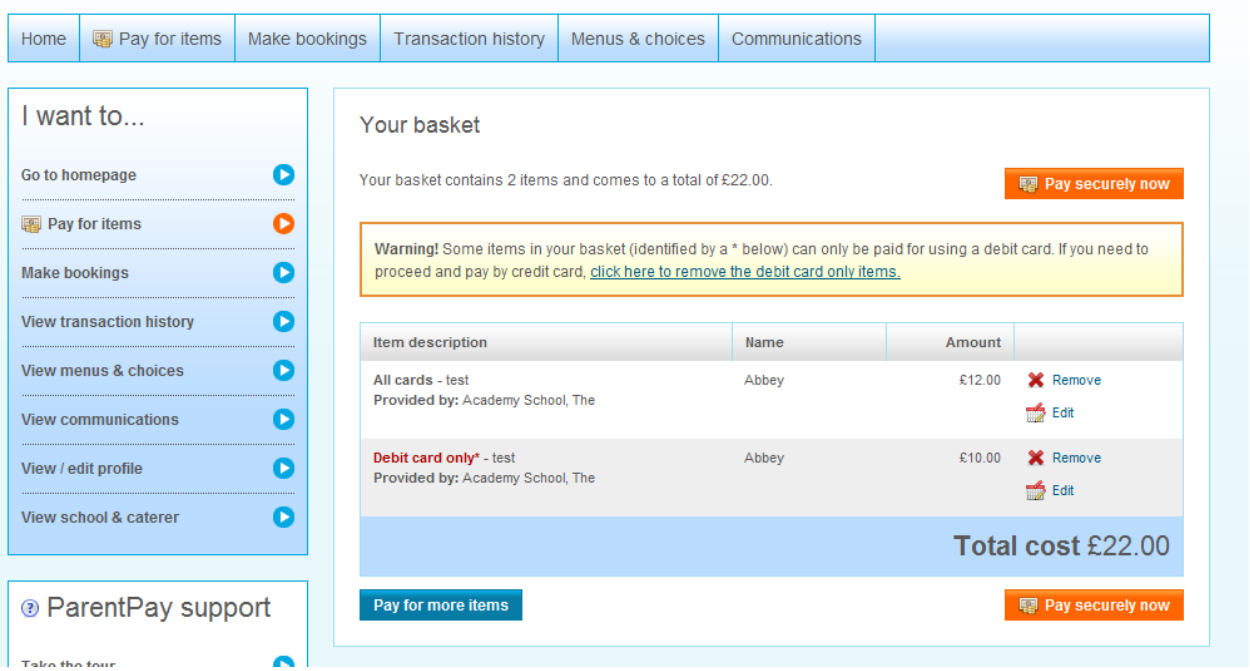


Cross school payments

Schools are able to restrict their ParentPay site to accept just debit cards should they wish – if you are using a single account login to make payment to multiple schools in one transaction and one of those schools has restricted payments to debit cards only, ParentPay will warn parents of this when they check out. In instances, such as this the items must be removed from the basket in order that parents can pay for the rest of the items.

Once parents have made payment for those items, they are then able to go back and select those debit card only payment items, add them to the basket and checkout as normal.

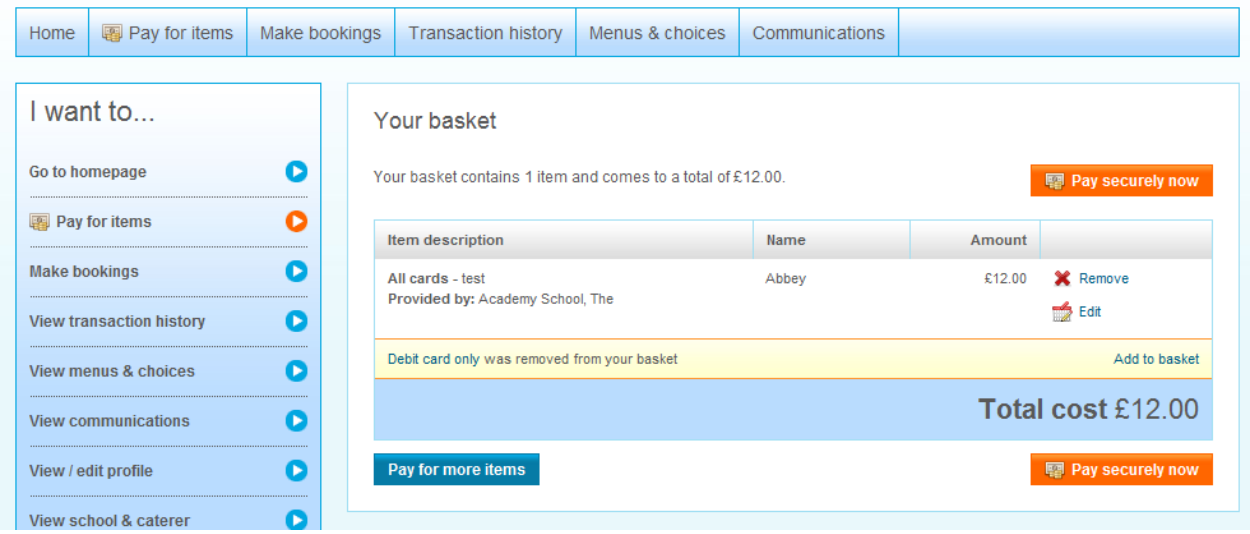
Parents select the items they would like to pay for as normal and go to **Checkout**



Your will see a 'Warning' message on screen: **Warning! Some items in your basket (identified by a * below) can only be paid for using a debit card. If you need to proceed and pay by credit card, click here to remove the debit card only items.**

The associated items also have **payment item name with a star in red*** (as in example screenshot above)

You can individually remove the items you are unable to pay for during this transaction or click on the link in the 'warning' message to remove all items that cannot be paid for at this time from your basket.



The basket is refreshed and a message displaying the payment item name and message: was removed from your basket.

Paying for 'Other' items

The **'Other'** tab will display items not necessarily associated with their child such as the SMS top-up payment items for those parents that subscribe to our automated text alerts.

View payments made between dates they choose

Go to **View transaction history** in the **'I want to...'** area on the left of their screen.

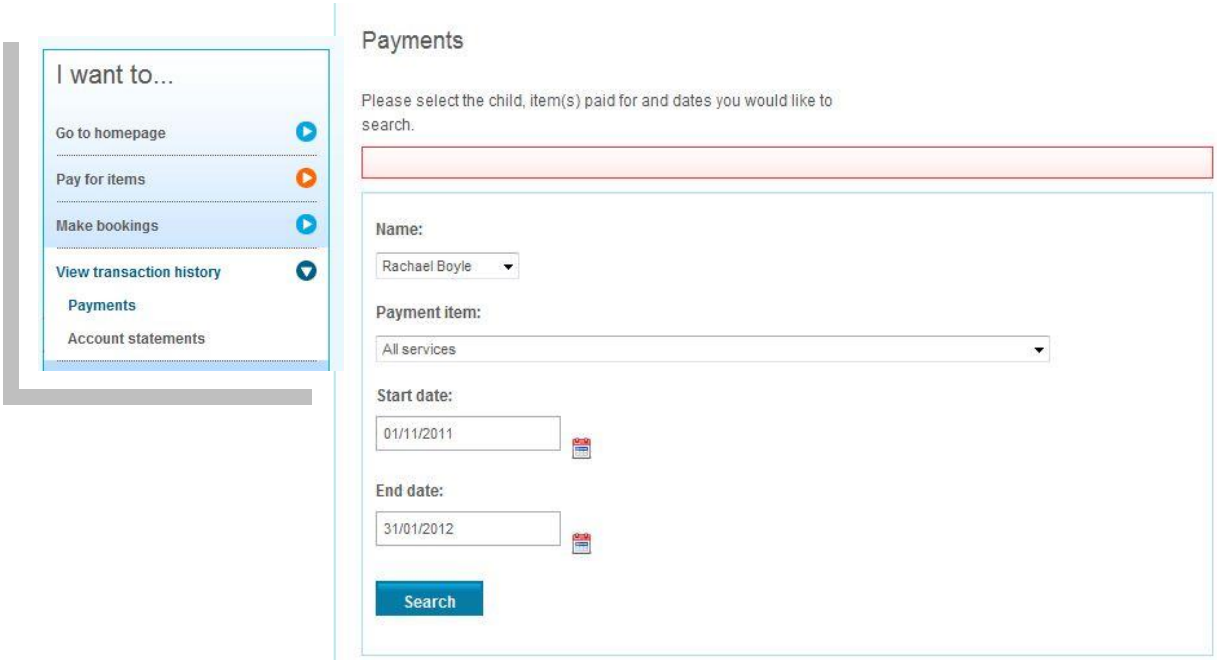
Name: choose the child they want to view payments for or leave as All to report on all payments across all their children.

Payment item: narrow their report down to the item they paid for or leave as All services for a complete history of payments across all items in that period.

Start date: Enter their start date (DD/MM/YYYY) or use the pop-up calendar to select the date.

End date: Enter their start date (DD/MM/YYYY) or use the pop-up calendar to select the date.

Click **Search**.



A comprehensive list of all payments they have made and any refunds the school may have made to them will show on screen.

Selected period: 01 Nov 2011 - 31 Jan 2012
Number of records: 74
Total: £1513.80

Child	Payment item	Payment method	£ Amount	Date paid	Paid to	Notes
Rachael	Greenacres visit to London 2012	NA	-15.00	20 Dec 2011	The Denewood's Community School	
Rachael	Greenacres visit to London 2012 07810 541350	ParentPay online	15.00	20 Dec 2011	The Denewood's Community School	07810 541350
Rachael	Cherry Orchard Primary visit to Stansfled	ParentPay online	78.00	14 Dec 2011	The Denewood's Community School	
Rachael	Visit to the Woodlands Centre	ParentPay online	6.00	14 Dec 2011	The Denewood's Community School	
Rachael	Dinner money for The Denewood Community School	ParentPay online	20.00	09 Dec 2011	The Denewood's Community	

View statement of transactions for a selected month

Their 'Account statements' enable them to run a report by month on items where there may be 'transactions/deductions' displayed against the payments they have made such as for a school meal account.

Go to **View transaction history>Account statements** in the **'I want to...'** area on the left of their screen.

Name: choose the child they want to view payments for or leave as All to report on all payments for all their children.

Account: narrow their report down to the item they paid for or leave as All services for a complete history of transactions across all items in that period.

Statement month: select the month and year using the drop down menus

Click **Search.**

Total paid in during period: £60.00
Total paid out during period: £0.00
Service provider: Kenilworth School and Sports College

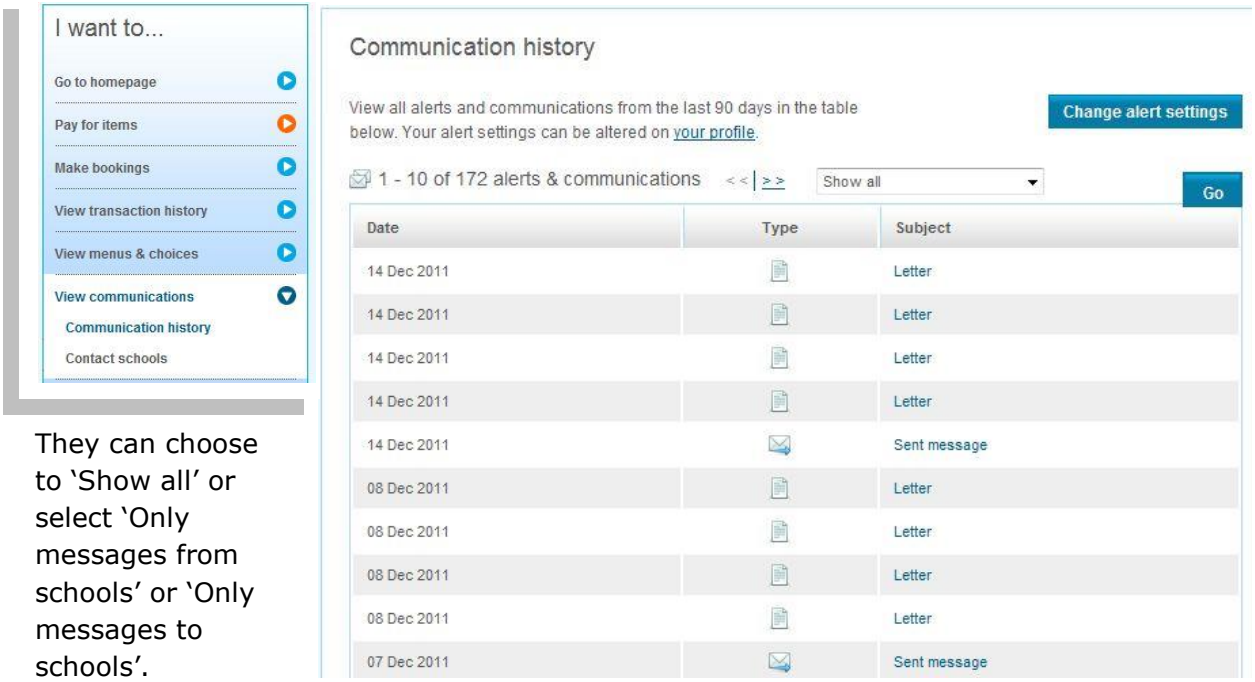
Date	Description	Paid out	Paid in	£ Balance
01 Dec 2011	Opening balance			416.09
06 Dec 2011	ParentPay	0.00	10.00	426.09
07 Dec 2011	ParentPay	0.00	10.00	436.09
07 Dec 2011	ParentPay	0.00	20.00	456.09
09 Dec 2011	ParentPay	0.00	20.00	476.09
31 Dec 2011	Closing balance			476.09

Alerts and communications

Another great feature enabling parents to view a history of all automated alerts, messages sent to them by their children/s school/s and any messages they have sent to school via ParentPay.

Communication history

Go to **View communications>Communication history** in the **'I want to...'** area on the left of their screen.



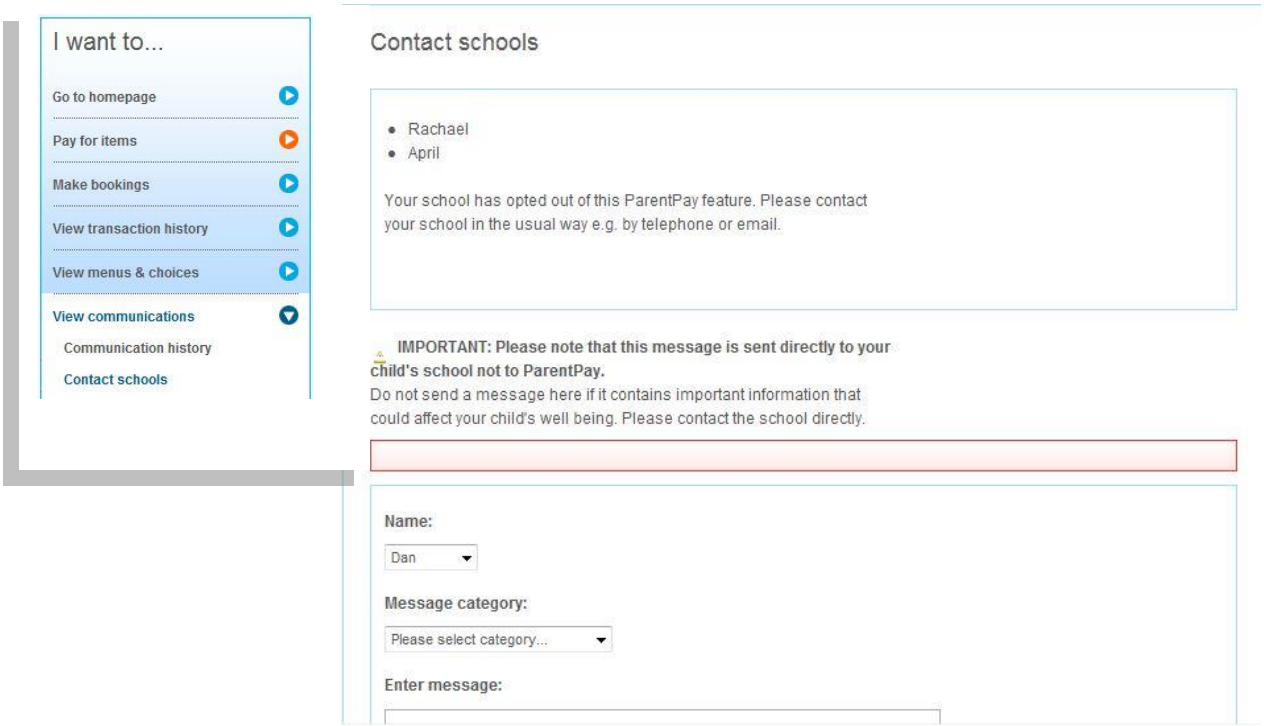
They can choose to 'Show all' or select 'Only messages from schools' or 'Only messages to schools'.
If they wish to change their alert settings they can do so by going to **View/edit profile>Alert settings** or clicking on the **Change alert settings button**.

Sending a message to their child's school

If your school has 'opted in' to our send message feature parents are able to contact you directly within ParentPay via their ParentPay login.

Please note: the send message feature is intended as a general communication tool, in the event that parents need to contact school urgently or tell you important information pertaining to their child they are advised to contact you directly by phone.

Go to **View communications>Contact schools** in the **'I want to...'** area on the left of their screen.


I want to...
Go to homepage
Pay for items
Make bookings
View transaction history
View menus & choices
View communications
Communication history
Contact schools
Contact schools
Rachael
April
Your school has opted out of this ParentPay feature. Please contact your school in the usual way e.g. by telephone or email.
IMPORTANT: Please note that this message is sent directly to your child's school not to ParentPay.
Do not send a message here if it contains important information that could affect your child's well being. Please contact the school directly.
Name:
Dan
Message category:
Please select category...
Enter message:

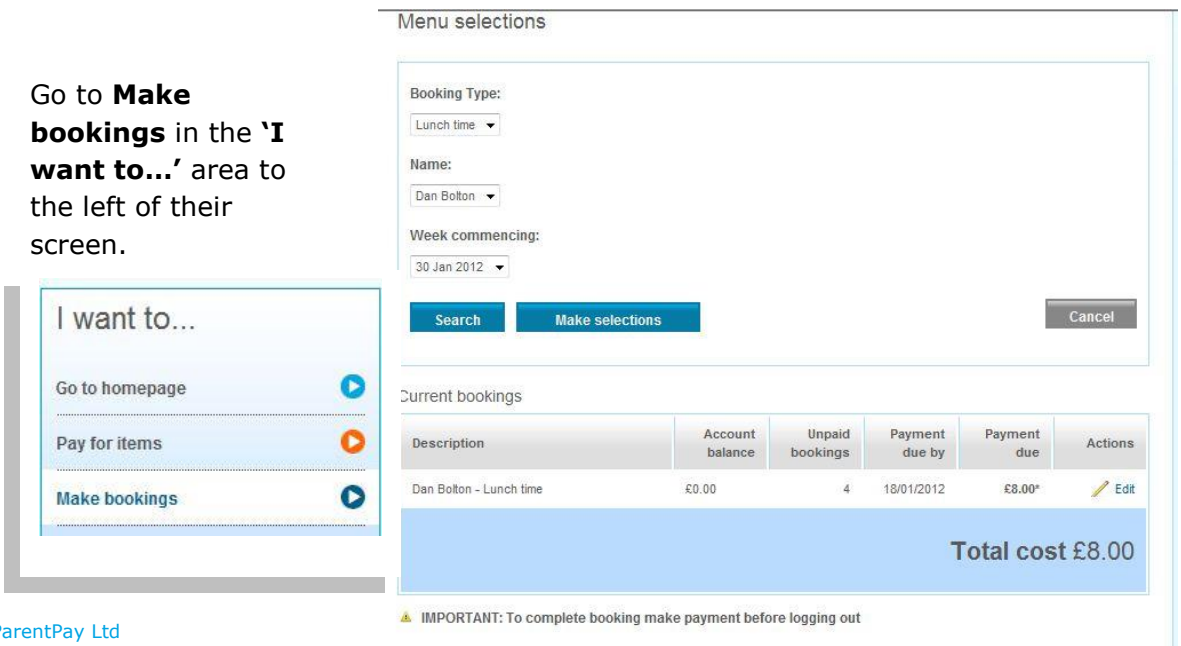
- **Name:** select the child the message is in relation to
- **Message category:** use the drop down menu to select
- **Enter message:** free type their message in the text box
- Click **Send message**

In the event that your school has 'opted out' of our send message feature a message will be displayed to parents on screen with a list of children the send message feature is not available for and they will be advised to contact the school in another way.

Making bookings/selections

If your school is using our 'bookings/selections' module, parents may be able to pre-book meals or sessions for certain types of payment items such as school meals and before/after school clubs.

Go to **Make bookings** in the **'I want to...'** area to the left of their screen.



- **Booking type:** select when the event is Lunch time, Breakfast etc.
- **Name:** select the child they want to make a booking for
- **Week commencing:** use the drop down menu to select the week they wish to make bookings for
- Click **Search**

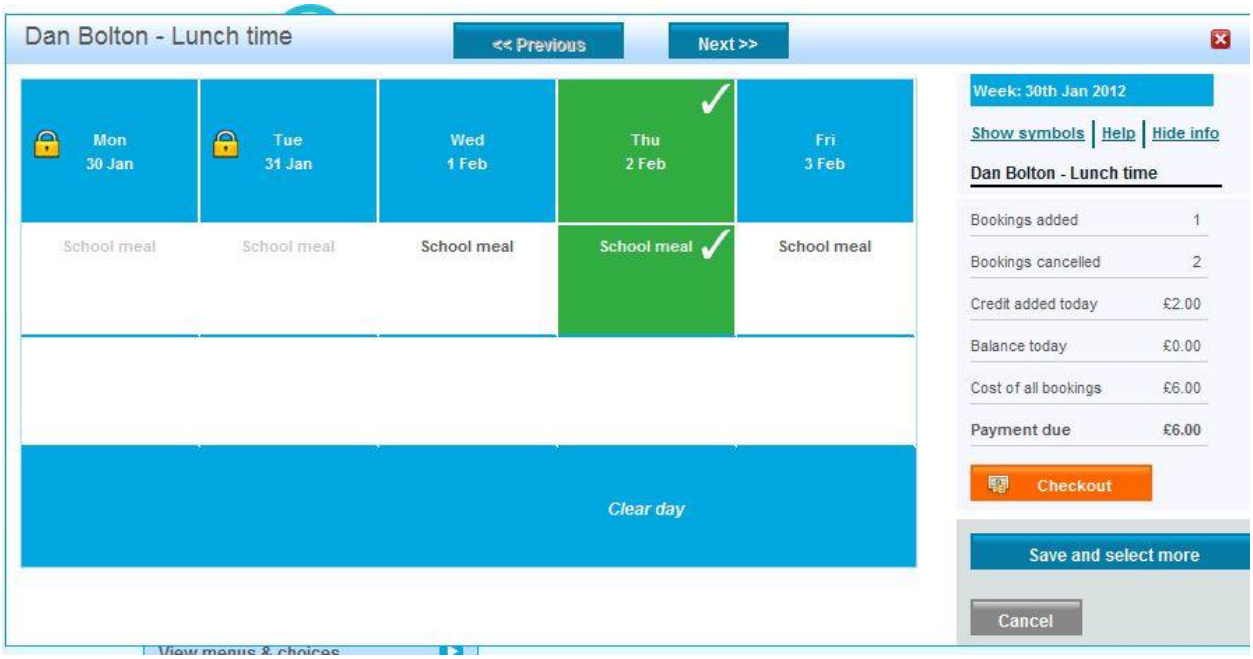
They can then view 'current bookings' for that 'booking type' on screen (as per the Current bookings area shown in the above screenshot).

- Click **Make selections** to proceed to make their bookings

Booking a meal/session – no menu selection

This feature is not available to all parents only those that have children at schools that have subscribed to our bookings module.

- **Book a meal/session:** simply click on the day that they want to book the meal for and that day will turn green with a tick.
- **Cancel a previously booked meal/session:** click on Clear day in the column of the day the meal is booked for.
- **Past event:** past bookings/sessions will show with a 'Padlock' sign as they are not editable after the event.
- **Bookings breakdown:** the right of their screen will show a breakdown of meals/sessions booked or cancelled during this login session, credit to be added before they logout, current balance of that account (school meal account or similar) and total cost of all bookings they have made during this session.

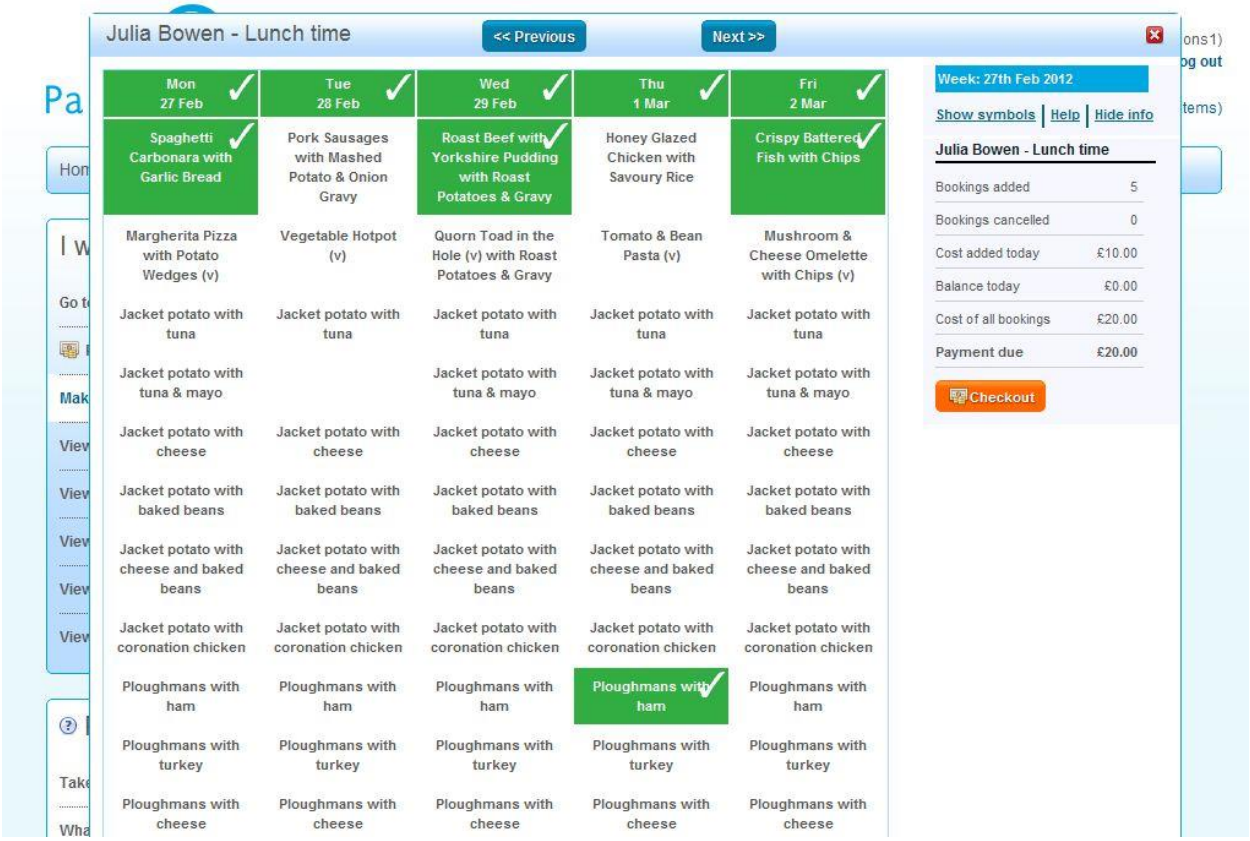


- **<<Previous or Next>>:** use these buttons to go to the previous or following week to make more bookings at this time.
- **Save and select more:** click to save the bookings on this screen and make bookings for another child before paying.
- **Checkout:** click to go to their basket and confirm that they wish to **Pay securely now.**

Booking a meal/session – menu selection

This feature is not available to all parents only those that have children at schools that have subscribed to our bookings module.

- **Book a meal/session:** simply click on the menu item they want to book for their child and that item will turn green with a tick.
- **Cancel a previously booked meal/session:** click on **'Clear day'** at the bottom of the column of the day the meal is booked for.
- **Past event:** past bookings/sessions will show with a 'Padlock' sign as they are not editable after the event.
- **Bookings breakdown:** the right of their screen will show a breakdown of meals/sessions booked or cancelled during this login session, credit to be added before they logout, current balance of that account (school meal account or similar) and total cost of all bookings they have made during this session.

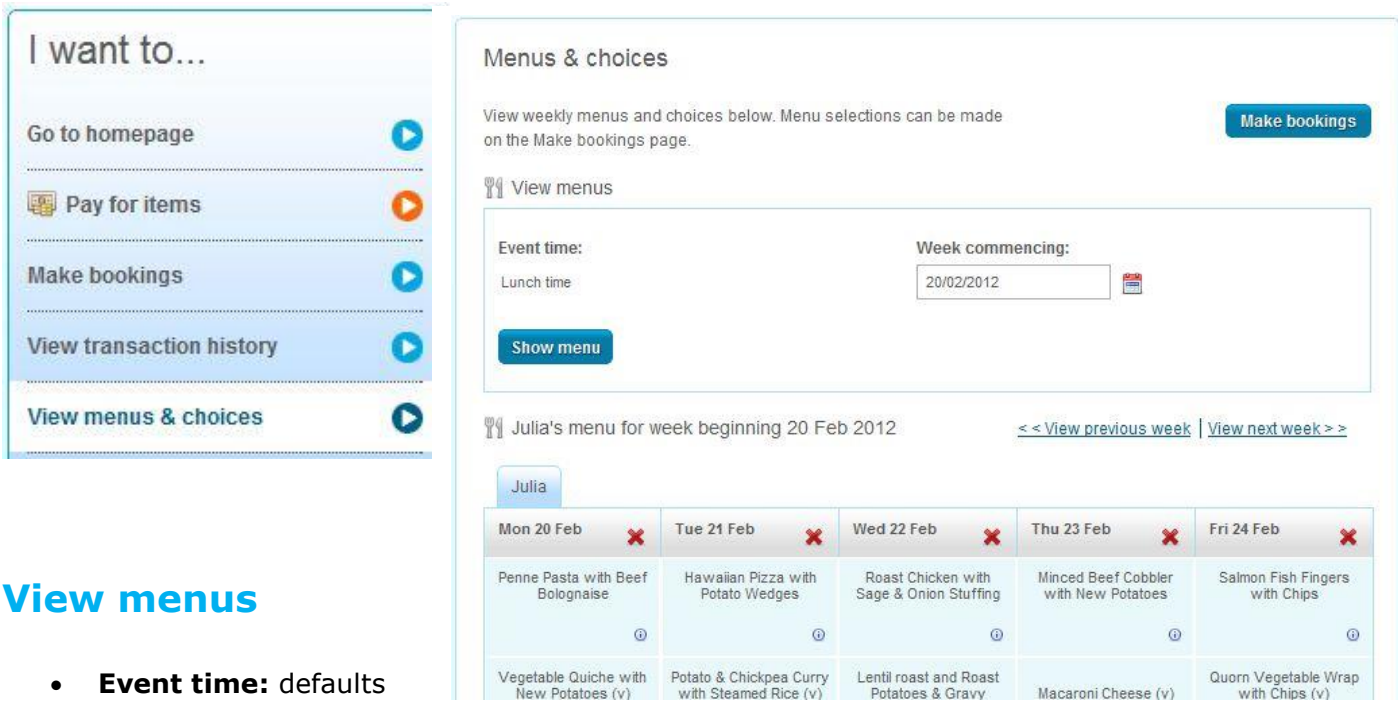

Julia Bowen - Lunch time
<< Previous
Next >>
Mon 27 Feb
Tue 28 Feb
Wed 29 Feb
Thu 1 Mar
Fri 2 Mar
Spaghetti Carbonara with Garlic Bread
Pork Sausages with Mashed Potato & Onion Gravy
Roast Beef with Yorkshire Pudding with Roast Potatoes & Gravy
Honey Glazed Chicken with Savoury Rice
Crispy Battered Fish with Chips
Margherita Pizza with Potato Wedges (v)
Vegetable Hotpot (v)
Quorn Toad in the Hole (v) with Roast Potatoes & Gravy
Tomato & Bean Pasta (v)
Mushroom & Cheese Omelette with Chips (v)
Jacket potato with tuna
Jacket potato with tuna & mayo
Jacket potato with cheese
Jacket potato with baked beans
Jacket potato with cheese and baked beans
Jacket potato with coronation chicken
Ploughmans with ham
Ploughmans with turkey
Ploughmans with cheese
Week: 27th Feb 2012
Show symbols | Help | Hide info
Julia Bowen - Lunch time
Bookings added 5
Bookings cancelled 0
Cost added today £10.00
Balance today £0.00
Cost of all bookings £20.00
Payment due £20.00
Checkout

- **<<Previous or Next>>:** use these buttons to go to the previous or following week to make more bookings at this time.
- **Save and select more:** click to save the bookings on this screen and make bookings for another child before paying.
- **Checkout:** click to go to their basket and confirm that they wish to **Pay securely now.**

View menus & choices

The ability to view menus and choices is dependent on the type of subscription the school has with ParentPay. Some parents may be able to view the school menu but not what their child has eaten/they have booked for their child, where others may be able to view both or nothing at all.

Go to **View menus & choices** in the **'I want to…'** area to the left of your screen.


I want to...
Go to homepage
Pay for items
Make bookings
View transaction history
View menus & choices
Menus & choices
View weekly menus and choices below. Menu selections can be made on the Make bookings page.
Make bookings
View menus
Event time:
Lunch time
Week commencing:
20/02/2012
Show menu
Julia's menu for week beginning 20 Feb 2012
< < View previous week | View next week > >
Julia
Mon 20 Feb
Tue 21 Feb
Wed 22 Feb
Thu 23 Feb
Fri 24 Feb
Penne Pasta with Beef Bolognaise
Hawaiian Pizza with Potato Wedges
Roast Chicken with Sage & Onion Stuffing
Minced Beef Cobbler with New Potatoes
Salmon Fish Fingers with Chips
Vegetable Quiche with New Potatoes (v)
Potato & Chickpea Curry with Steamed Rice (v)
Lentil roast and Roast Potatoes & Gravy
Macaroni Cheese (v)
Quorn Vegetable Wrap with Chips (v)

View menus

- **Event time:** defaults to lunch time
- **Week commencing:** choose the week to view the child's school menu
- Click **Show menu**
- Click on the **Make bookings** button if to make bookings at this time

Viewing existing/past/future bookings for a child

The **'Dan's menu for the week beginning 20 Feb 2012'** area in the screen shot below will show the booked meals for Dan during that week.

Click **'View previous week'** or **'View next week'.**

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